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DRUMHELLER/ DINOSAUR CORRIDOR

Destination Resort Plan

MARCH, 1989

Alberta
TOURISM

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Office of the Deputy Minister

18th Floor, 10025 Jasper Avenue, Edmonton, Alberta, Canada T5J 3Z3 Telex 037-3651 403/427-4368

TO WHOM IT MAY CONCERN

The Government of Alberta recognizes that tourism is a major economic factor in the Province. In an attempt to capitalize upon the increasing growth of tourism, a series of potential tourism generator projects have been identified.

The following consultant's report identifies and examines potential tourism generator projects in the Drumheller/Dinosaur Corridor. This Tourism Destination Resort Plan reviews the impact and relationship of these tourism generators to local and regional tourism frameworks. The plan assesses existing tourism resources, potential tourism markets, regional requirements and opportunities, economic impacts and the potential roles of various participating sectors.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism and does not represent government policy nor any commitment to implementation at this time.

If you have any comments relative to the report please forward them to:

Regional Planning Unit
Destination Planning Branch
16th Floor, 10025 - Jasper Ave.
Edmonton, Alberta
T5J 3Z3

Additional copies of the report are available by contacting the above address, or by telephoning 427-2501.

Sincerely,

Bernard F. Campbell
Deputy Minister

TABLE OF CONTENTS

Page

EXECUTIVE SUMMARY i

1.0 INTRODUCTION 1

1.1 Background 1
1.2 Study Purpose 1
1.3 Report Format 1

2.0 CONTEXT 2

2.1 Regional Setting 2
2.2 Tourism Genertors 2

3.0 DELINEATION OF THE STUDY AREA 3

4.0 INVENTORY OF TOURISM RESOURCES 4

4.1 Introduction 4
4.2 Tourism Services 5

4.2.1 Accommodation 5
4.2.2 Campgrounds 8
4.2.3 Food Services 11

4.3 Tourism Attractions 11

4.3.1 Introduction 11
4.3.2 Attractions 12
4.3.3 Events 17

4.4 Tourism Infrastructure 18

4.4.1 Municipal Servicing Constraints 18
4.4.2 Community Recreational Facilities 19
4.4.3 Transportation Network 20
4.4.4 Proposed Transportation Improvements 21

4.5 Tourism Programs 23

4.5.1 Introduction 23
4.5.2 Drumheller Community Tourism Action Plan/ Brooks Community Tourism Action Plan 23
4.5.3 The Alberta Main Street Programme 23
4.5.4 Big Country Tourist Association Marketing Plan/ Gateway Tourist Association Marketing Plan 24

continued/...

TABLE OF CONTENTS (Continued)

Page

4.6 Summary 24

4.6.1 Accommodation 24
4.6.2 Food Services 25
4.6.3 Attractions 25
4.6.4 Services 25

5.0 TOURISM MARKET ASSESSMENT 27

5.1 Travel Patterns 27
5.2 Visitor Profiles 29
5.3 Tourism Generator Visitor Projections 30

6.0 TOURISM DEVELOPMENT OPPORTUNITIES 32

6.1 Introduction 32
6.2 Assessment of Current Level of Supply 32

6.2.1 Infrastructure 32
6.2.2 Services 34
6.2.3 Attractions 36

6.3 Tourism Development Opportunities 38
6.4 Destination Resort Opportunities 38
6.5 Marketing Principles and Approaches 40

7.0 ECONOMIC IMPACT OF GENERATOR DEVELOPMENT 42

7.1 Introduction 42
7.2 Inputs 42
7.3 Income and Employment Impacts 44

APPENDIX A: Bibliography
APPENDIX B: List of Contacts

EXECUTIVE SUMMARY

INTRODUCTION

BACKGROUND

- With the increasing growth of tourism, and its recognition as a major economic factor in the Province, a number of recent tourism initiatives have been implemented by the Government of Alberta. One of these new initiatives involves the identification and assessment of a series of potential tourism generators throughout the Province.

- As each of these potential tourism generators are identified, there is a need to determine the impact and relationship of the facility within the local and regional tourism frameworks. In order to assess this impact, it will be necessary to prepare a destination plan for each identified tourism generator. Accordingly, in February of 1989, the IBI Group was retained to generate a Destination Plan for the Drumheller/Dinosaur Corridor.

STUDY PURPOSE

- The purpose of the Destination Plan is twofold:

  1) to determine the regional context of the facilities; their impact on the region and potential tourism opportunities that could be created by their development; and

  2) to determine the site requirements, the adjacent tourism resort opportunities, if any, related to the potential development of the proposed tourism generators.

CONTEXT

- The Drumheller/Dinosaur Corridor is geographically oriented along the Red Deer River Valley. There are two major urban centres; Drumheller (population 6,700) in the centre of the study area, and Brooks (population 10,000) at the southern limit of the study area. Adjacent to Brooks is the Trans Canada Highway. The City of Calgary is a 1-1/2 hour drive to the west from either urban centre.

- There are three potential major tourism generators located within the study area. The Tyrrell Museum, with visitation of approximately 500,000 per annum, together with Midland Provincial Park, are centrally located in Drumheller. Serving as a south anchor is Dinosaur Provincial Park, a designated World Heritage Site, which does not presently have extensive tourism service/facility development. The north anchor of the study area is Dry Island Buffalo Jump Provincial Park, which does not have any tourism service/facility development at present.

- There are other potential regional tourism generators that have been identified for the study area. They include a Calgary-Drumheller steam train, and the Atlas Coal Mine (East Coulee) interpretive development (underground mine tours, tourist facilities, etc.).

DELINEATION OF THE STUDY AREA

- The study area encompasses 50% of the western third of the Big Country Tourism Zone and a portion of the northwestern corner of the Gateway Tourism Zone. It is geographically-oriented along the Red Deer River Valley which traverses in a northwesterly to southeasterly direction. Exhibit 3-1 depicts the study area and regional context.

- The study area defines the area of primary economic impact. The majority of the identified development opportunities and long-term economic benefits generated by the operation of the Tyrrell Museum and other tourism facilities are expected to be concentrated in the primary area. Although economic benefits are expected to accrue to secondary areas - particularly in the near-term - their impact will be more diffused, and will consequently afford fewer new development opportunities.

- Delineation of the primary impact zone was based on the consideration of a number of factors, including regional service centre trading areas; the distribution of natural, cultural and other tourism resources; geographic features; and travel patterns. The primary economic impact zone includes Drumheller's population - weighted area of economic influence (service area) relative to other similar sized service centres. It also includes Brooks which functions as the service centre for Dinosaur Provincial Park and thematically, considers itself part of this tourism area.

INVENTORY OF TOURISM RESOURCES

- A comprehensive inventory of tourism resources within the primary impact zone was undertaken including:
    - **Tourism Attractions** - Man-made features (i.e., cultural, historical resources), special events, (i.e., fairs, competitions) and natural features (i.e., lakes, scenic natural environments) that are of existing or potential interest to tourists.
    - **Tourism Services** - Hotels, motels, campgrounds and restaurants.
    - **Tourism Infrastructure** - The regional and inter-regional transportation network, the extent of urban utility servicing and community recreational facilities.

Tourism Attractions

- Drumheller and the immediate area have the greatest variety and concentration of attractions within the study area. These include man-made attractions such as the Tyrrell Museum, Homestead Antique Museum, Prehistoric Park, Buffalo Trail, Rosedale Suspension Bridge, Atlas Coal Mine and East Coulee Tressel Bridge. Natural attractions include the hoodoos, Horsethief Canyon, Horseshoe Canyon and Midland Provincial Park. There have been no new attractions developed in this region for approximately 20 years.

- The Tyrrell Museum is a major tourism generator in the study area, attracting approximately 500,000 persons per year.

- Within the immediate vicinity of Brooks, there is also a signficant concentration of attractions, including Dinosaur, Kinbrook Island and Tillebrook Provincial Parks.

- Within the southern portion of the study area, between Drumheller and Brooks, there is a general lack of attractions.

Tourism Services

- In terms of fixed roof accommodation, there are a total of 722 rooms in the study area, with 45% of the total in Drumheller and 42% of the total in Brooks.

- With respect to campground accommodation, there are 1,239 campsites identified in 21 campgrounds within the study area.

- With respect to food services, these are concentrated in the two large urban centres of Drumheller and Brooks, totalling some 51 food service facilities.

Tourism Infrastructure

- The examination of tourism infrastructure included municipal servicing, community recreational facilities, transportation network and information network. The current deficiencies are detailed further on within the Executive Summary (Tourism Development Opportunities/Assessment of Current Level of Supply).

TOURISM MARKET ASSESSMENT

- Total visitation to the Gateway and Big Country Zones was estimated at 1,068,000 person trips in 1986, which represented an increase of 25% over the 1984 level.

- The Tyrrell Museum of Palaeontology is the largest single attraction in a region, with annual visitation of approximately 500,000. A number of other much smaller attractions - including five Provincial Parks - are also located within the study area.

- A visitor profile was developed for the area. Regional visitors are overwhelmingly from Alberta origins, travelling in family parties, on day trips. Visitors tend to travel by private automobile, or by R.V. For the minority of visitors who do spend the night in the region, campgrounds and hotels/motels account for the majority of the accommodation types used.

- The seasonal distribution of trips is strongly concentrated in the vacation months of July and August, which account for roughly half of the total trips.

- The Tyrrell Museum - major attraction in the area - is attracting visitors who are unusually well educated, and who have much higher than average household incomes. These visitors also tend to be in the older age groups.

- Average expenditures are relatively high, with overnight visitor parties averaging expenditures of $70.00 per day, while day visitors parties average expenditures of $25.00 per day.

- Visitation projections have been prepared for the three Provincial Parks in the tourism generators program. The three Provincial Parks are currently attracting some 61,000 day visitors, and 26,000 overnight campers, for an annual total of approximately 87,000 person visits. The total projected visitation for the three Parks is 250,000 day visitors, and 132,000 overnight campers, for a total visitation projection of 382,000 person visits per annum.

- The Calgary-Drumheller steam train study estimated annual ridership at approximately 150,000 person trips.

- The Atlas Coal Mine Interpretive Centre is currently attracting visitation of approximately 30,000 persons per annum. With additional improvements, annual visitation is estimated at 75,000 persons per annum.

- Although a detailed feasibility study is required, the preliminary indications are that a family vacation/destination resort will be viable in the near future in the study area. A conservative visitation estimate of 30,000 annual person visits for this type of facility was employed.

- At present the tourism generators and attractions noted above account for some 117,000 person visits per annum, while the projections noted above would result in a total of approximately 604,000 person visits per annum.

- The substantial increase in projected visitation should be considered within the context of the recent surge in visitation to the region which was generated by the Tyrrell Museum. Considered within that context, the visitation projections may represent an achievable long-term goal.

TOURISM DEVELOPMENT OPPORTUNITIES

Assessment of Current Level of Supply

- The current level of supply is assessed under the following three headings: infrastructure, services and attractions.

Infrastructure

Utilities

- There are adequate levels of utility servicing throughout urban centres in the study area. In particular, the larger centres of Drumheller (and immediate area hamlets) and Brooks utility servicing systems do not pose constraints to additional development.

Transportation Network

- The transportation network within the region is generally good with most roads and highways being of adequate standard to meet traffic volume needs.

- Certain new road linkages, as identified by Alberta Transportation, are required to better serve tourism and local economic needs of the region. Of particular note is the lack of a direct linkage along the Red Deer River between Drumheller and Dinosaur Provincial Park.

- Given the narrow and unsurfaced shoulder conditions in most of the highways throughout the region, the addition of "turn-outs" in selected locations would greatly improve conditions for tourist traffic, particularly over-sized vehicles and trailers.

- Current poor surface conditions necessitate upgrading of the Dinosaur Trail tourist route.

Tourist Information/Signage

- The lack of a coordinated tourism signage program is a deficiency of significant proportions and is an impediment to full realization of tourism potential, not only in the Dinosaur Country region, but throughout the Province. It should be noted that there is no Drumheller identification associated with the Tyrrell Museum highway signage. Further, directional signage, particularly for attractions, within the region itself is inadequate.

- The major tourism generators in the region, particularly the Tyrrell Museum and Dinosaur Provincial Park, will function not only as attractions in their own right, but as regional distributors of visitor traffic. This critical function must not be under-estimated in the conceptualization and delivery of tourism information services. At present, there is a significant deficiency on the part of both the above attractions in providing this critical function.

- There is a definite lack of support from smaller, regional tourist information outlets in providing comprehensive tourism information services for the entire Dinosaur Country tourist region.

- The present City-operated tourist information booths in Drumheller are under-sized and inadequately located. They are currently located at the bottom of the steep river table lands; hence, access is awkward, parking is confusing and there is a lack of effective visual presentation.

- There is a lack of adequate regional identification/entry points as well as site specific signage for many of the areas' secondary attractions. What signage exists, lacks a coordinated and themed approach.

- Given the "Dinosaurs and More" marketing theme recently adopted by Zone 3, and the very strong general appeal of dinosaurs, major identity features including large-scale model dinosaurs should be developed at the entries to the region. These sites could also include large-scale maps and additional information of individual attractions as well as picnic tables, landscaping, etc. Preferred locations would include the intersections of Highways 2 and 9, and the Trans Canada and 873/36.

Brochure/Advertising

- There is a lack of high quality brochure material for many of the secondary attractions. This is necessary to support the previously noted need for increased and coordinated distribution to tourists.

Recreational Facilities

- There appears to be an adequate level of community recreational facilities to provide recreational opportunities for tourists.

- There is a lack of specialized, unique experience-related recreational services and activities available to tourists in the study area, including the major tourism nodes (Drumheller and Dinosaur Provincial Park/Brooks). In particular such services could take better advantage of the Red Deer River for such opportunities as rafting, canoeing, etc.

Services

Hotels/Motels

- The available data is insufficient to calculate the deficiency in supply of hotel and motel units. However, given peak season occupancy of near 100% in both Drumheller and Brooks it is obvious that additional supply is required.

- Some of this unsatisfied demand could be accommodated in smaller centres throughout the study area if facilities are substantially upgraded.

- Accommodation within the region - with the exception of one or two marginal facilities in Brooks and Drumheller - is not of adequate quality. While price sensitive demand is being served, tourists who are seeking a higher quality experience may tend to bypass the area. This is particularly important given the visitation profile trends (out-of-country, above average economic background of Alberta-based visitors). Unfortunately, the low level of off-season visitation reduces the financial viability of higher amenity types of facilities.

- All accommodation facilities within the region are lacking family-oriented, recreation/entertainment amenities. These will be extremely important, particularly within the larger centres, in keeping tourists in the area for a longer duration.

- There is considerable scope to improve existing facilities within the area. In addition, there are good opportunities for the creation of more specialized accommodation products which offer unique experiences, i.e., bed and breakfast, guest ranches, etc.

Campgrounds

- Although excess supply exists during the peak season it is primarily a function of the poor quality/lack of services in the available product rather than a lack of demand. In addition, as repeat visitation to the Tyrrell Museum continues, demand for quality camping facilities is expected to increase. Consequently, there is scope to add to the inventory in locations throughout the study area.

- It is anticipated that the majority of the increased demand can be accommodated in the planned expansion of the Provincial Parks.

- From a qualitative standpoint, there is considerable latitude for upgrading existing facilities, i.e., provision of additional serviced hook-ups, amenities and activities. This is particularly true for the campgrounds benefitting from their close proximity to area attractions. Only through the provision of a broader range of services will tourists be encouraged to stay overnight in the area and extend the lengths of their stay.

Restaurants

- Considerable scope exists for the provision of tourist-oriented food services. Restaurants are generally not oriented to visitor requirements at present. A notable constraint to most restaurants in the study area is that they do not have the capacity to handle large groups of visitors.

- Good opportunities exist for the provision of unique eating experiences; i.e., seasonal specialty outlets such as ice cream and confections, family or higher profile chain restaurants, and "higher-end" dining facilities.

- From a qualitative standpoint, there is considerable latitude for the upgrading of existing facilities.

Retail Goods

- The wide variety of goods and services available in Drumheller and Brooks does not necessitate the addition of DSTM (department store-type merchandise) facilities at this time; however, increasing tourism visitation to the area should necessitate the provision of specialized tourist-oriented retail outlets (i.e., sportswear, gifts/souvenirs, books/magazines, authentic crafts, etc.).

- The limited summer hours of operation (no evenings) for retail outlets in Drumheller represents a lost opportunity in terms of capturing additional tourism expenditures and providing night time activities.

Automobile Service

- Drumheller, Brooks and the other towns and villages in the study area offer a variety of independent and manufacturer-affiliated service facilities, in addition to a large number of fuel and minor service facilities. It is therefore anticipated that further development of the tourism generators will not necessitate additional automobile service facilities.

Attractions

- With the exception of the Drumheller and Brooks regions, the study area has a limited number of attractions. Outside the major urban centres and the Provincial Parks, the attractions are widely dispersed. Day trip opportunities (based out of Drumheller) are limited due to this overall deficiency and lack of clustering. The southern part of the study area is notably deficient in tourism attractions of any sort.

- There is latitude for the upgrading of many of the man-made secondary attractions in the study area, particularly in Drumheller and the smaller urban centres. With the exception of the proposed Reptile World in Drumheller, there has been a general lack of any new attractions in the study area for a considerable period of time.

- Further development of Dry Island Buffalo Jump and Dinosaur Provincial Parks could provide the study area with strong attraction anchors at either end of the corridor. However, the provision of quality road linkages would be required to facilitate the anticipated visitation to the parks.

- Excepting the major attractions of Dinosaur Provincial Park and the Tyrrell Museum, there is a significant lack of awareness of other attractions in the study area. This has helped to limit tourism to day trip or single night visitation.

- There is a notable lack of activities, particularly night time activities, within Drumheller. This deficiency will cause a loss of large numbers of visitors, and museum visitors in particular, to other centres with an associated loss of accommodation and related expenditures. Consequently, there is a requirement for the addition of attractions/activities/events that will encourage visitors to either extend their day use activities, stay overnight or plan a return trip.

- Many of the smaller, secondary attractions are seasonal in nature, further serving to constrain the off-season tourism appeal of the area.

- There is considerable scope for additional special events which are oriented to tourists as well as regional users. A large number of these are further elaborated upon in the Drumheller Community Tourism Action Plan which provides an implementation strategy for the enhancement and promotion of existing special events which should assist in complementing tourism within the region.

- Achieving a critical mass of attractions within the study area will require a number of initiatives, including:

  - enhancement of existing attractions;
  - packaging/promotion of existing attractions;
  - addition of attractions/activities; and
  - marketing and management of existing and proposed attractions.

- The aforementioned initiatives have been addressed, to a large extent, in recent marketing-related studies undertaken within the Drumheller area.

- There is latitude for enhancing opportunities at the Tyrrell Museum. These would be within the areas of exhibits and programming, facility and visitor services, marketing and promotion.

- There are additional natural, native culture and mining history resources in the Red Deer River Valley corridor which could be developed and promoted as tourism attractions.

TOURISM DEVELOPMENT OPPORTUNITIES

- Evolving from a synthesis of data from the tourism inventory, the market assessment and the assessment of the quality and quantity of existing tourism services, tourism development opportunities are detailed in the accompanying matrices. Potential opportunity types are briefly described; where possible, specific locations are detailed along with operating sector/agency responsibility and priority with respect to implementation. Priority has been ranked from 1 to 5, with 1 being the highest priority.

DESTINATION RESORT OPPORTUNITIES

- The family vacation destination resort plan, a concept program of Alberta Tourism, was identified as a potential private sector opportunity for the Drumheller/Dinosaur Corridor. The typical resort, as envisioned by Travel Alberta, would serve as a "visitor destination", providing complete services for tourists, including overnight facilities and recreation facilities.

- Three potential sites were identified near Drumheller, one in the Hamlet of Nacmine, one in Drumheller itself, and the other adjacent to the hoodoos on Highway 10. A fourth, in Brooks, is already being developed along these concept lines.

- A comprehensive development in one of above locations, as described, could significantly augment the existing tourism base and would benefit from its relatively close relationship with the Tyrrell Museum and other attractions in the Drumheller vicinity.

ECONOMIC IMPACT

- The capital expenditures required to construct and improve the tourism generator facilities, the operating expenditures associated with the functioning of the facilities, and the expenditures made by visitors to the tourism generator facilities will have significant impact on the regional economy.

- The estimated capital costs for the proposed improvement of the three Provincial Parks, the steam train, and the family vacation/destination resort are $19,970,000 in 1989 dollars.

- The incremental annual operating expenditures for the above-noted generators are estimated at $3,670,000.

- Visitor expenditures associated with the above-noted generators are estimated at $9,570,000 annually.

- The provincial impacts of the generators are summarized in the table below:

ECONOMIC IMPACT OF GENERATOR DEVELOPMENT

GENERATOR	ITEM	INPUTS*	EMPLOY-MENT	MULTIPLIERS	GDP IMPACT*
Provincial Parks	Capital	$15,330	285	1.56	$23,910
	Operating	960	46	2.02	1,940
	Expenditures	5,170	89	1.41	7,290
	Sub Totals	-	420	-	$33,140

ECONOMIC IMPACT OF GENERATOR DEVELOPMENT

GENERATOR	ITEM	INPUTS*	EMPLOY-MENT	MULTIPLIERS	GDP IMPACT*
Steam Train	Capital	$ 3,140	58	1.56	$ 4,900
	Operating	2,610	124	2.02	5,270
	Expenditures	3,940	68	1.41	5,560
	Sub Totals	-	250	-	$15,730
Family Vacation /Destination Resort	Capital	$ 1,500	28	1.56	$ 2,340
	Operating	100	5	2.02	200
	Expenditures	460	8	1.41	650
	Sub Totals	-	41	-	$ 3,190
TOTAL	Capital	$19,970	371		$31,150
	Operating	13,240	340		20,910
	Total	-	711	-	$52,060

* In thousands of 1989 dollars.

- It is calculated that development of the above-noted potential tourism generators could result in regional economic impacts of $19,700,000, based on complete implementation, and an ongoing annual economic impact of $10,270,000 for the operating-related and visitor expenditure spending.

- The employment potentially generated within the region by these benefits could total 240 person year equivalents of the capital spending, and 159 person year equivalents annually from the operation of the tourism generators.

TOURISM DEVELOPMENT OPPORTUNITIES

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
INFRASTRUCTURE					
Information	- Relocation of Drumheller tourist information booths (2). Include upgrading and size of structure, combined with highway turn-out/rest area.	- Hwy 9 entry points (2) to City; however, on top of hill, as opposed to existing location at bottom of hill.	- City of Drumheller, Chamber of Commerce, Travel Alberta	1	- Provide better access, visibility, opportunity for visitor orientation.
	- Upgrading tourist information services with additional literature and on-site personnel.	- Tyrrell Museum, Dinosaur Provincial Park (Tyrrell Field Station).	- Alberta Culture/ Travel Alberta	1-2	- Required for increased secondary attractions awareness.
Information	- Coordinated, themed signage for all attractions in study area.	- Local, regional entry point (road/highway) and site-specific locations.	- Travel Alberta, Big Country/ Gateway Tourist Associations	1-2	- Required for increased attractions awareness and easy identification for tourists.
Information	- High-quality brochures for all attractions in study area.		- Private operators, Big Country/Gateway Tourist Associations		
	- Increased availability of attractions brochures.	- Distribution to all retail/service outlets, tourist information locations and other attractions.	- Private.	2	- Promote concept of complimentary, as opposed to competing attractions.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Information	- Major identity features at entry points to study area - intersections of Highways 2 & 9 and Highway 1 & 873/36 could take the form of a large-scale model dinosaur. Reinforces identity and theme of tourism attraction as well as providing photo opportunity. Also appropriate location for comprehensive information signage with large-scale map and additional detail on individual attractions. Site could also include picnic benches, landscaping, etc.	- Intersections of Highways 2 & 9 and Highway 1 and 873/36.	- Travel Alberta, Big Country/ Gateway Tourist Associations	2	- Required for increased awareness of region and reinforcement of theme.
Highways/Roads	- Corridor road network linkage.	- Drumheller to Dinosaur Provincial Park.	- Joint effort between Alberta Transportation and local municipalities.	1	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
	- Upgrading of selected roads. Also, an opportunity for enhancement of identified auto tours, through improved thematic signage and additional roadside turn-outs.	- Dinosaur Trail, East Coulee Trail. - Access road network to Dinosaur and Dry Island Buffalo Jump Provincial Parks. - Access road to Wayne.	- Joint effort between Alberta Transportation, local municipalities and the Heritage Society.	1-2	
SERVICES					
Restaurants	- Opportunities for upgrading of existing restaurants, including decor and menu. Expansion of some facilities in major urban centres to allow for tour bus groups.	- Primary opportunities in Brooks and Drumheller. - Some possibilities for upgrading within the rest of the study area.	- Private.	1-2	- Requirement for existing food services to tap expected increased visitation.
	- Opportunities for creation of unique, higher-quality eating experiences, themed restaurants and family/chain-type restaurants.	- Primary opportunities in Brooks and Drumheller. - Secondary opportunities in hamlets close to Drumheller (i.e., Rosedale, East Coulee, Wayne) or close to	- Private	2-3	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Restaurants (continued)		Brooks (i.e., Patricia), as well as Dinosaur Provincial Park.			
	- Opportunities for seasonal specialty outlets (i.e., ice cream and confections).				- Suitable localities would be in conjunction with certain attractions (i.e., East Coulee School Museum).
Accommodation	- Opportunities for more unique accommodation, catering to increased seasonal traffic - bed and breakfast, and guest ranch-variety accommodation in older homes, farm houses, etc.	- Primary opportunities within Brooks, Drumheller and scenic locations near Red Deer River.	- Private.	1	
	- Opportunities for higher-quality hotels/motels.	- Drumheller, Brooks.	- Private.	1	
	- Opportunities for full recreational amenity/ service hotels/motels that cater more specifically to families.	- Drumheller, Brooks.	- Private.	1	- Either upgrade of existing hotels/motels or new developments.
	- Opportunities for additional hotels/motels.	- Drumheller, Brooks.	- Private.		- Requirement for expected increased visitation.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Campgrounds	- Opportunity for full services/facilities campground, combined with recreational opportunities (Family Vacation Destination Resort).	- Willow Creek, Drumheller (Newcastle Beach) or Nacmine.	- Private, cooperation with Municipality.	1-2	- Preferred locations are Willow Creek and Drumheller.
	- Opportunity for upgrading of private campgrounds (grounds, facilities, etc.)	- Drumheller	- Private.	1-2	
Specialty Merchandise	- Opportunities for provision of specialty and tourist-oriented merchandise (i.e., gifts and crafts, fine art, specialty clothing items).	- Drumheller, Brooks.	- Private.	3-4	
	- Opportunities for specialty outlets (i.e., art gallery, antique store, etc.).				
ATTRACTIONS					
Coal Mining History Interpretation/ Display	- Atlas Coal Mine: opportunity for full development utilizing innovative interpretive planning and delivery. Potential to	- East Coulee.	- Dinosaur Valley Heritage Society.	1-2	- Tentative plans by the Society to develop underground tours/ interpretation.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Coal Mining History Interpretation/ Display (continued)	become second major tourism generator in Drumheller area, and to play a significant role in extending the trip time and length of stay of visitors to the valley.				
	- East Coulee School Museum - opportunity for enhancement of displays and interpretation, foot/ cycle linkage to Atlas Coal Mine, Tressel Bridge and Drumheller.	- East Coulee.	- Dinosaur Valley Heritage Society	2-3	- Tentative plans by society to further develop the mining display component.
	- Small communities and old mine sites have potential to upgrade interpretive information and signage, and provide key guide maps identifying locations.	- Wayne (and specifically the Rosedeer Hotel/Last Chance Saloon), Dorothy, etc.	- Dinosaur Valley Heritage Society	3-4	- Could also be combined with a roadside turn-out and minimal day use facilities.
Settlement Period Site Interpretation/ Display	- Opportunity exists for the Homestead Museum to upgrade their facility, collection, management and interpretation. Target market segment of the Tyrrell visitorship.	- Drumheller.	- Private.	3	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Settlement Period Site Interpretation/ Display (continued)	- Enhancement opportunity for Bleriot Ferry; develop passive interpretation, improve amenities and facilities at crossing (such as pull-out, picnic tables).	- North of Drumheller on Dinosaur Trail.	- Alberta Transportation/Parks and Recreation/ Alberta Culture, together with the Dinosaur Valley Heritage Society.		- Addresses concern of peak season crossing line-ups, with no activities to do during wait.
Native Settlement Period Site Interpretation/Display	- Opportunity to enhance three key sites (Crawling Valley, Rumsey Cairn and Suitor Medicine Wheel) through improved interpretive signage. Possible limit to guided tours, due to site concerns.	- Rumsey, Dorothy and Hwy. 36/Red Deer River.	- Private, Heritage Society and Alberta Culture.	3-4	- Concern over site sensitivity, land ownership and access.
Interpretation	- Opportunity for enhanced thematic linkage of tourism resources in the Red Deer River Valley (Red Deer River Heritage Corridor). Linkage must extend to and include all resource categories (palaeontological, native settlement, coal mining/ pioneer settlement). Establishment of interpretive themes,	- Red Deer River Valley (Dry Island Buffalo Jump Provincial Park to Dinosaur Provincial Park).	- Alberta Transportation, Parks and Recreation, Alberta Culture, Travel Alberta, Municipal and Improvement Districts, urban municipalities and local interest groups.	1	- Requirement to coordinate with road network linkage opportunities. - Requirement for a Corridor Master Plan and cooperation of all sectors/agencies involved.

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
	priorities, routes, signage, facilities, promotion, etc.				
Interpretation	- Opportunity for enhancement of existing sites and development of potential Red Deer River Badlands sites. Further scenic and educational tourism experience through additional interpretive and facility development.	- Horseshoe Canyon, Horsethief Canyon, Dinosaur Trail/Orkney Viewpoint, hoodoos and other natural sites and features.	- Alberta Parks and Recreation.	2-3	
Interpretation	- Opportunity for enhancement of Fossil Museum and Prehistoric Park by providing alternative/complimentary interpretation of palaeontological themes not adequately dealt with by the Tyrrell Museum. Also, upgrading of signage and presentation.	- Drumheller.	- Private.	2-3	
Tyrrell Museum	- Opportunity for enhancement of museum, exhibits and programming: - exhibit updating, replacement and rotation.	- Interpretive Gallery.	- Alberta Culture, Parks and Recreation, Travel Alberta, Friends of the Tyrrell Museum.	1	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Tyrrell Museum (continued)	- development of more active, rather than passive, interpretive experience ("hands on", simulation experiences, special events, roving interpreters). - Upgrading and extension of existing facility (overcome typical black box museum through outside exhibits, fossil/rock garden, etc. - closer integration, and cooperation between Dinosaur Trail, Midland Provincial Park, Red Deer River Heritage Corridor and the Fossil Museum, in interpretive planning and delivery. - Opportunity for enhancement of facility and visitor services:				

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Tyrrell Museum (continued)	- Cafeteria upgrading to a "cafe" level service, with interior decorating and higher-quality menu and service.				
	- Upgrading and expansion of gift shop.				- Friends of the Tyrrell assume responsibility of contracting out the gift shop and cafeteria to the private sector.
	- Upgrading and expansion of visitor information services on tourism attractions and facilities elsewhere in the area, through the use of an orientation map and kiosk, attractions display and brochure racks.				
	- Opportunities for enhancement of marketing and promotion:				
	- Marketing plan targeted towards non-resident visitors travelling in the Calgary-Banff region.				

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Tyrrell Museum (continued)	- Increased range of distribution of print material (Calgary-Banff).				
	- Development of a remote logo highway signage program.				- Heighten interest/ awareness on Hwys 1 and 2.
	- Development of a more proactive marketing program aimed at Alberta, B.C. and Saskatchewan.				
	- More active participation in consortium marketing.				- In conjunction with the Drumheller Valley Tourism Authority, Big Country Tourist Association, etc.
Tyrrell Field Station	- Opportunity for enhancement of directional signage, marketing/ promotion strategy, integration with Tyrrell Museum and Red Deer River Heritage Corridor.	- Dinosaur Provincial Park.	- Alberta Culture, Parks and Recreation, Travel Alberta, Tourism Zones.	1	

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Summer Theatre	- Prime opportunity to expand existing summer theatre, as well as provide an additional theatre in East Coulee. Increased duration of existing theatre (i.e., entire summer peak season, matinees for tour bus groups, supplementary night-time activity for tourists).	- Expand Rosebud Dinner Theatre. - East Coulee (use of School Museum).	- Private, Heritage Society.	2	- Tentative plans for expansion of Rosebud operation and facilities. - Tentative plans for theatre facility development at East Coulee School Museum.
	- Opportunity to create travelling theatre group to service campgrounds in the study area on a rotational basis, thereby providing required night time activity.	- Circuit of campgrounds within the study area.	- Private.	3	
Activity Experiences	- Prime opportunity for water-based recreation activities, such as rafting tours and canoe/raft rentals. Will provide greater linkage within Corridor, particularly with Dinosaur Provincial Park.	- Red Deer River (Dry Island Buffalo Jump Provincial Park to Dinosaur Provincial Park).	- Private.	2	- Requirement for additional access locations along the river.

1.0 INTRODUCTION

1.1 BACKGROUND

With the increasing growth of tourism, and its recognition as a major economic factor in the Province, a number of recent tourism initiatives have been implemented by the Government of Alberta. One of these new initiatives involves the identification and assessment of a series of potential tourism generators throughout the Province.

As each of these potential tourism generators are identified, there is a need to determine the impact and relationship of the facility within the local and regional tourism frameworks. In order to assess this impact, it will be necessary to prepare a destination plan for each identified tourism generator. Accordingly, in February of 1989, the IBI Group was retained to generate a Destination Plan for the Drumheller/Dinosaur Corridor.

1.2 STUDY PURPOSE

The purpose of the Destination Plan is twofold:

1) to determine the regional context of the facilities; their impact on the region and potential tourism opportunities that could be created by their development; and

2) to determine the site requirements, the adjacent tourism resort opportunities, if any, related to the potential development of the proposed tourism generators.

1.3 REPORT FORMAT

The following report details the findings of the Drumheller/Dinosaur Corridor Destination Resort Plan. The report is divided into seven sections as follows:

1.0 Introduction
2.0 Context
3.0 Delineation of Study Area
4.0 Inventory of Tourism Resources
5.0 Tourism Market Assessment
6.0 Tourism Development Opportunities
7.0 Economic Impact

2.0 CONTEXT

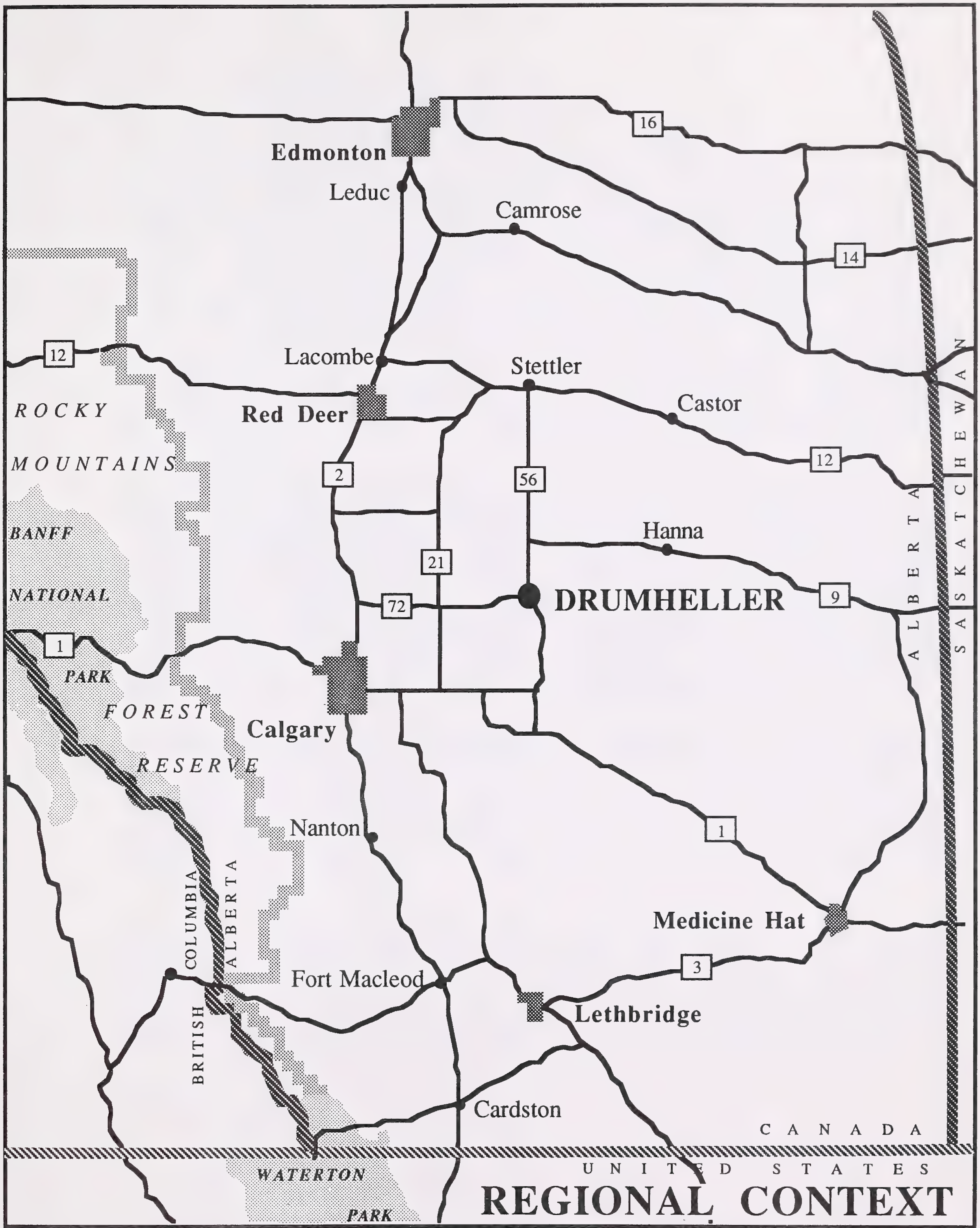
2.1 REGIONAL SETTING

Exhibit 2-1 depicts the regional context of the Dinosaur Country corridor. Located in South/Central Alberta, the corridor is geographically oriented along the Red Deer River Valley. There are two major urban centres; Drumheller (population 6,700) in the centre of the study area, and Brooks (population 10,000) at the southern limit of the study area. Adjacent to Brooks is the Trans Canada Highway. The City of Calgary is a 1-1/2 hour drive to the west from either urban centre.

2.2 TOURISM GENERATORS

There are three potential major tourism generators located within the study area. The Tyrrell Museum, with visitation of approximately 500,000 per annum, together with Midland Provincial Park, are centrally located in Drumheller. Serving as a south anchor is Dinosaur Provincial Park, designated a World Heritage Site, which does not presently have extensive tourism service/facility development. The north anchor of the study area is Dry Island Buffalo Jump Provincial Park, which does not have any tourism service/facility development at present.

There are other potential regional tourism generators that have been identified for the study area. They include a Calgary-Drumheller steam train, and the Atlas Coal Mine (East Coulee) interpretive development (underground mine tours, tourist facilities, etc.).



REGIONAL CONTEXT

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EXHIBIT
2-1

3.0 DELINEATION OF THE STUDY AREA

The study area encompasses 50% of the western third of the Big Country Tourism Zone and a portion of the northwestern corner of the Gateway Tourism Zone. It is geographically-oriented along the Red Deer River Valley which traverses in a northwesterly to southeasterly direction. Exhibit 3-1 depicts the study area and regional context. The study area defines the area of primary economic impact. The majority of the identified development opportunities and long-term economic benefits generated by the operation of the Tyrrell Museum and other tourism facilities are expected to be concentrated in the primary area. Although economic benefits are expected to accrue to secondary areas - particularly in the near-term - their impact will be more diffused, and will consequently afford fewer new development opportunities.

Delineation of the primary impact zone was based on the consideration of a number of factors, including regional service centre trading areas; the distribution of natural, cultural and other tourism resources; geographic features; and travel patterns. The primary economic impact zone includes Drumheller's population - weighted area of economic influence (service area) relative to other similar sized service centres. It also includes Brooks which functions as the service centre for Dinosaur Provincial Park and thematically, considers itself part of this tourism area.

It should be noted that the study area as defined does not really function as a single economic/tourism unit and while it is linked thematically, the area constitutes two distinct nodes with indirect and limited transportation links. One of the challenges in transforming the area into a comprehensive tourism unit will be the resolution of this transportation deficiency.

Currently, the City of Red Deer (particularly with respect to the northern portion of the study area) and the City of Calgary, by virtue of its size and relative number of tourist attractions/services, exert a considerable influence over the study area. As tourism resources are developed within the Drumheller/Dinosaur Corridor, this dominance is expected to decrease.

4.0 INVENTORY OF TOURISM RESOURCES

4.1 INTRODUCTION

The ensuing section summarizes the inventory of tourism resources in the study area. The tourism resources are assets that attract tourists and serve their needs including tourism attractions, tourism services and tourism infrastructure. These categories and definitions are based on those used in the Community Tourism Action Plan program manual of Alberta Tourism.

- **Tourism attractions** include man-made features (i.e., cultural, historical resources), special events (i.e., fairs, competitions) and natural features (i.e., lakes, scenic natural environments) that are of existing or potential interest to tourists. These constitute the reason(s) why tourists come specifically to an area or spend time in an area while passing through.

- **Tourism services** include hotels, motels, campgrounds and restaurants. The extent and quality of these services partially influences the tourist's decision to come to and/or stay in an area, and affect their overall experience of the area.

- **Tourism infrastructure** includes the regional and inter-regional transportation network, the extent of urban utilities servicing and community recreational facilities. As stated in the Community Tourism Action Plan booklet "the way people get to an area - and the basic utilities available to them on arrival - can affect a community's ability to attract tourists". The quality of the infrastructure also affects a community's ability to develop new attractions and services.

The inventory of tourism resources was compiled from secondary data sources, personal communications and a three day field visit. The secondary sources used include:

- Alberta Accommodation Guide
  (Alberta Hotel Association, 1988)

- Alberta Campground Guide
  (Alberta Hotel Association, 1988)

- Alberta Touring Guide
  (Alberta Tourism (Travel Alberta), 1988)

- Drumheller Tourism Development Study
  (prepared for Drumheller Tourism Development Commission, Berger, Hetherington & Associates/Nichols Applied Management, 1988)

- Brooks Tourism Action Plan
  (Brooks Tourism Board, 1988)

- Drumheller Tourism Action Plan
  (Drumheller Tourism Board, 1988)

- Marketing Plan
  (Gateway Tourist Association, 1988)

- Alberta Main Street Programme: Resource Team Report (Drumheller)
  (Robert Graham, 1988)

Various public agency and private sector contacts were used to expand upon existing data and/or supply new inventory data. A list of those persons contacted is provided in Appendix B. A three day field visit to the study area provided additional inventory information.

The balance of this section summarizes the tourism resources by the three defined categories. More detailed inventory tables for all resources identified under tourism services and attractions are provided in Appendix C,* and study area photographs are included in Appendix D.*

4.2 TOURISM SERVICES

4.2.1 Accommodation

The inventory of hotels and motels is summarized in Exhibit 4-1 and depicted graphically in Exhibit 4-2. In total, 722 rooms were identified in 24 establishments, representing 13 communities in the study area.

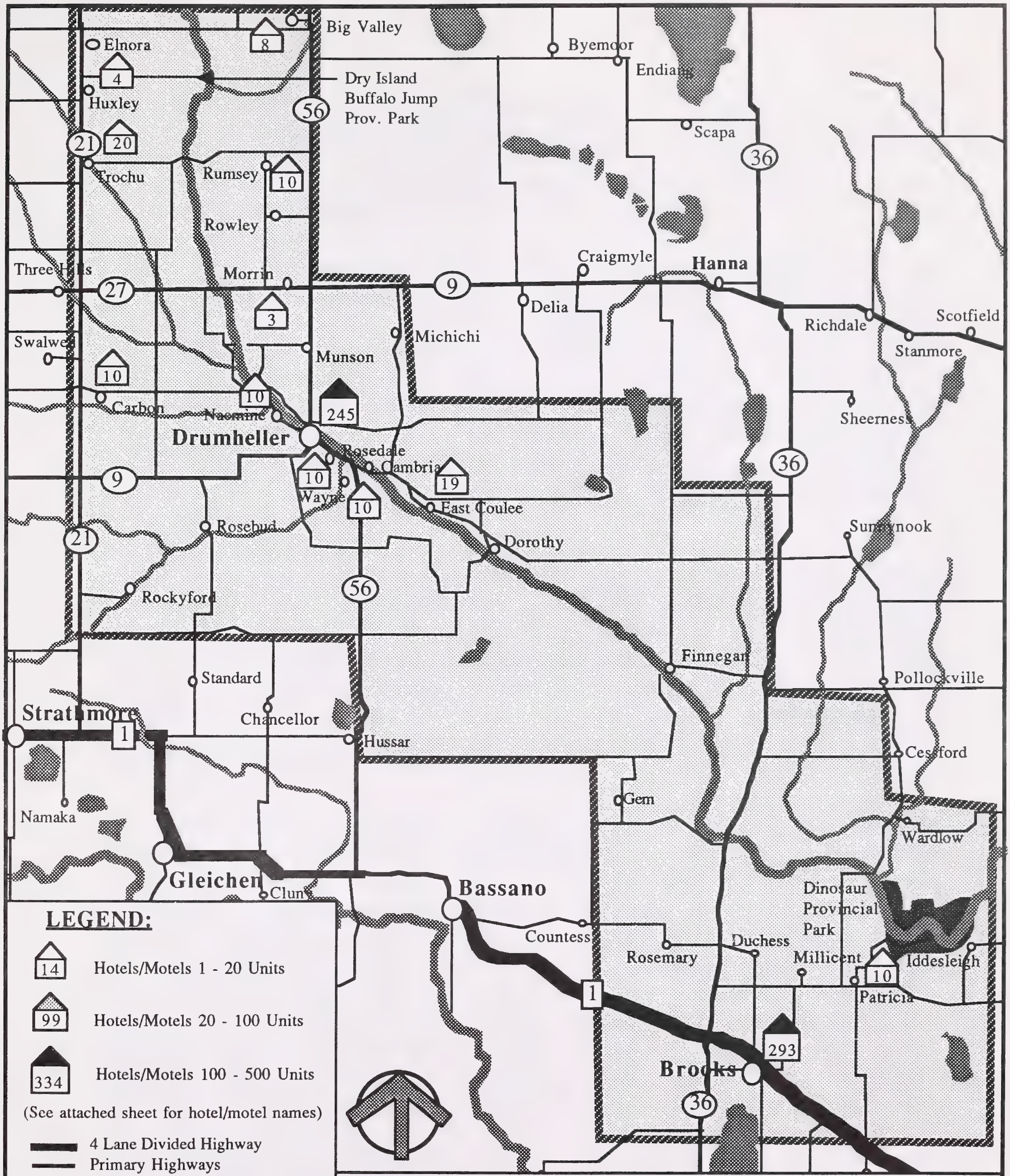
The largest concentration of hotels/motels is in Drumheller, with a population of 6,500. This concentration of hotels/motels represents the centre of the study area. Significantly they are close to a large number of tourist attractions, particularly the Tyrrell Museum. Single hotels/motels are

*Technical Reports available on request.

EXHIBIT 4-1

Fixed Roof Accommodation Summary

LOCATION	NUMBER OF UNITS	% OF STUDY AREA
Drumheller	315	45
Rosedale	10	1
East Coulee	19	2
Nacmine	10	1
Big Valley	8	1
Rumsey	10	1
Carbon	10	1
Trochu	20	2
Morrin	3	1
Wayne	10	1
Elnora	4	1
Patricia	10	1
Brooks	293	42
TOTAL	722	100%



HOTELS / MOTELS

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EXHIBIT
4-2

located in small villages and hamlets scattered throughout the northern part of the study area. Brooks has a similar concentration of hotels/motels to Drumheller. With the exception of Brooks and a small hotel in Patricia there is no fixed roof accommodation in the southern part of the study area around Dinosaur Provincial Park.

Seasonal occupancy patterns for hotels/motels are quite different for those in Drumheller, East Coulee and Brooks, compared to those in the rest of the study area. Hotel/motel occupancy in Drumheller is at or near 100% during peak season (July/August) due to the influx of tourists visiting attractions in the immediate area. Hotels/motels in Brooks are close to 90% in peak season, but have higher occupancy rates than Drumheller during the shoulder and off-season, due to the proximity of the Trans Canada Highway. Smaller centre hotels generally have much lower yearly occupancy rates and less seasonal fluctuation. Seasonal variations in occupancy are summarized by centre in Exhibit 4-3.

Patron origin and trip purpose vary significantly by hotel/motel location in the study area. In the Drumheller and East Coulee areas, hotel/motel patrons are almost exclusively tourists; during the peak and shoulder seasons, the majority are from out-of-province or country, while the balance include Alberta-based visitors. However, the hotels/motels are underutilized in the shoulder season and off-seasons, when patronage is primarily drawn from work crews (oil industry, etc.), business travellers and regional visitors.

The hotels/motels in the rest of the small centres rely on work crews and business-related travellers on a year-round basis. Only a small percentage of their business is from tourists. In places such as Carbon and Trochu the tourism patronage was categorized by operators as predominantly overflow from Drumheller. In Brooks, hotel/motel patrons have different origin and trip purpose characteristics. During the peak season approximately 50% are tourists (Alberta, out-of-province and U.S.) with a more significant amount of patrons than the rest of the study area being business/work-related. There is also a stronger base of business/work patronage during the shoulder and off-seasons. Hunting season (September - November) generates a significant number of Alberta and Saskatchewan-based visitors.

Most hotels/motels in Drumheller are moderately sized (20 - 50 units) with only one larger (100 units) and one smaller (8 units) facility. Prices range in the lower and middle ends of the market, in the $25.00 - $55.00

EXHIBIT 4-3

Fixed Roof Seasonal Occupancy

LOCATION	PEAK (July/Aug)	SHOULDER (May, June, Sept, Oct)	OFF (Nov-Apr)	ANNUAL AVERAGE
Drumheller	100%	40 - 70%	30 - 40%	50%
East Coulee	90%	60 - 70%	10%	40%
Morrin	40 - 50%	40 - 50%	40 - 50%	45%
Brooks	90%	80%	70%	75%
Trochu	35 - 40%	20%	20%	25%
Big Valley	30 - 40%	30 - 40%	30 - 40%	35%
Patricia	30%	25%	20%	25%
Carbon	35 - 40%	20 - 25%	20 - 25%	25%
Wayne	-	-	-	20%
Rosedale	-	-	-	15%
Rumsey	-	-	-	15%
Elnora	-	-	-	30%

range. In the smaller centres in the study area all of the hotels/motels are very small (3 - 10 units) establishments, with prices at the lower end of the market, in the $25.00 - $35.00 range. In Brooks the hotels/motels are all moderately sized (20 - 60 units), with prices catering to the middle end of the market, in the $30.00 - $45.00 range.

Hotels/motels in the study offer only the most basic services, such as kitchenettes or restaurant/coffee shop. Food services and taverns are often combined with the small centre hotels. There is a general lack of recreational amenities offered by the hotels/motels, which restricts visitors' entertainment options.

A qualitative ranking system was established for the hotels/motels in the study area. The rankings include: 1 (above average), 2 (average), 3 (below average) and 4 (poor). The ranking for individual hotels/motels is detailed in the tables found in Appendix C. The ranking criteria included extent of services and amenities, aesthetics and location. Hotels/motels in the larger urban centres of Drumheller and Brooks are predominantly average to below average in quality. There is a lack of above average and high quality accommodation in these areas as well as the study area in general. Smaller centre hotels are below average to poor in quality, and as such are not suitable for tourists, other than a small, price-sensitive portion of the market.

A rating system was also established to measure the development potential of hotels/motels. Rankings included: good potential, moderate potential, and low potential. Rankings for individual hotels/motels are detailed in the tables found in Appendix C. The ranking criteria included adjacent land uses, access, proximity to services/attractions, site aesthetics/attractiveness and available land for expansion.

The vast majority of hotels/motels have low to moderate development potential. Those with low potential are mostly in the small urban centres. Those with moderate potential are generally located in Drumheller and Brooks. The most significant constraint was site attractiveness.

There is limited availability of alternative forms of fixed roof accommodation in the study area. Only one guest ranch, located east of Trochu, is available with limited capacity. With respect to existing bed and breakfast opportunities there is one existing facility in Drumheller. It can accommodate 10 guests and operates at about 90 - 100% occupancy during a short season (May to September). Four to five additional operators have approached the City of Drumheller to establish similar bed and breakfast facilities. The Big Country Bed and Breakfast Agency, out of Rosebud, has approximately 6 - 8 country ranch homes listed in the region, with most being in or close to Rosebud.

4.2.2 Campgrounds

The inventory of campgrounds is summarized in Exhibit 4-4 and depicted in Exhibit 4-5. In total, 1,239 sites were identified in 21 campgrounds, representing 13 centres (and immediate area) or Provincial Parks.

Campgrounds are concentrated in the northern part of the study area, with the exception of the Brooks area. Although many are small, there is a greater number and variety in the northern part. In the southern part of the study area there are three provincial campgrounds in the vicinity of Brooks. Except for one small campground on Highway 56, there is a lack of campgrounds between Drumheller and Brooks. This coincides with a lack of urban centres, attractions and adequate road network. Campgrounds in the study area fall within one or more of three locational categories; in Provincial Parks, in or near urban centres or adjacent to Red Deer River road crossing points.

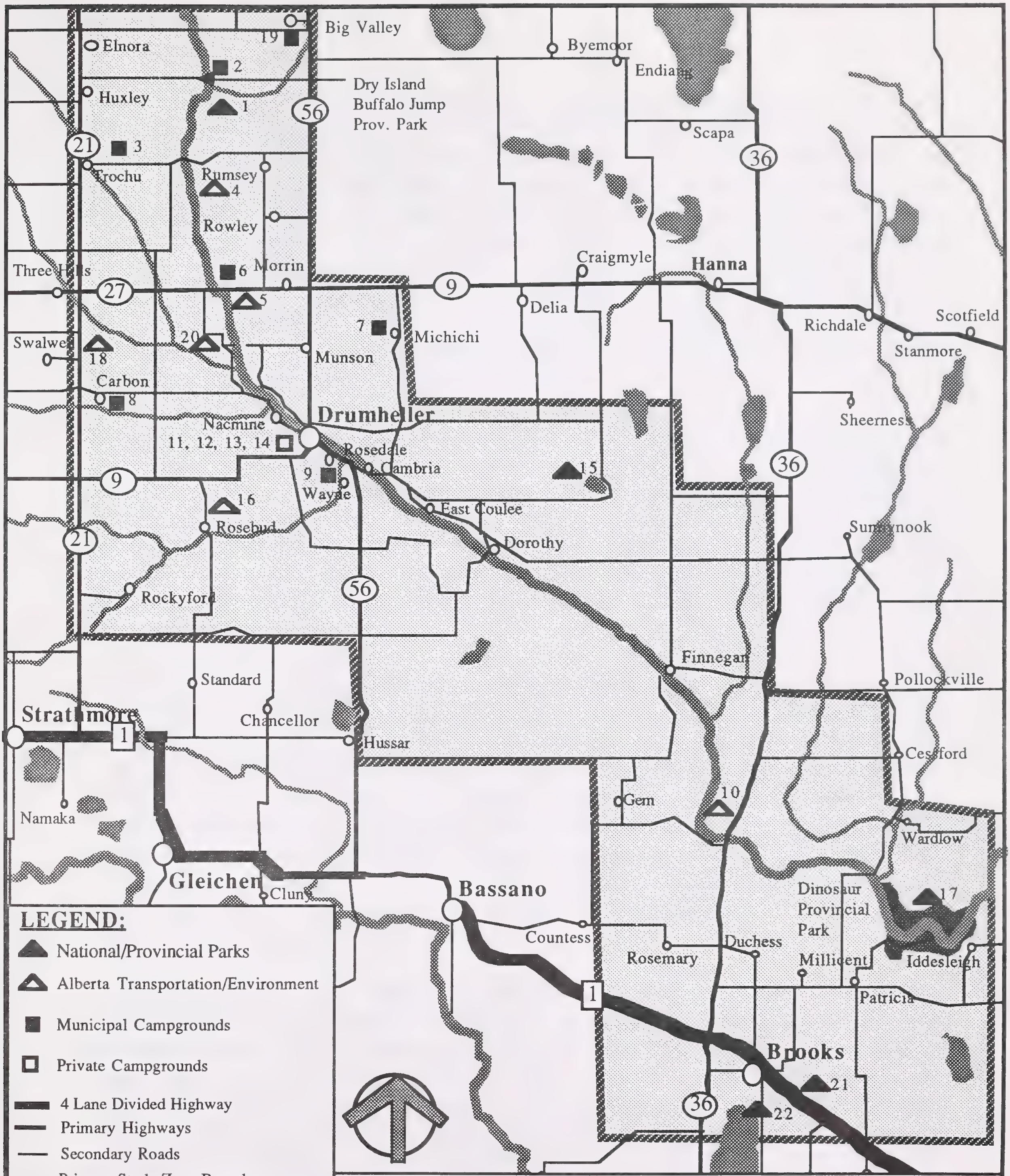
Seasonal occupancy patterns vary by type and location of campgrounds in the study area. Campgrounds in Drumheller, which are all private, range from 60 - 80% occupancy during peak season, with a significant drop off in the shoulder season (5 - 20%). Much smaller municipal campgrounds at urban centres in the northern part of the study area have occupancy rates that vary significantly during peak season (20 - 70%). Shoulder season rates are similar to or less than those in Drumheller. Rural location campgrounds, operated either by Alberta Transportation, Alberta Parks and Recreation or a municipality, have peak season occupancy rates of between 20 and 70%. Provincial Park campground occupancy rates vary significantly. Dinosaur Provincial Park has the highest campground occupancy during peak season (65 - 75%). Tillebrook and Kinbrook range between 30 - 55% occupancy, while Little Fish Lake averages only 10 - 20% during peak season.

Patron origin and trip purposes vary significantly by campground location in the study area. In Drumheller and immediate area the private campgrounds attract predominantly Alberta-based patrons (70 - 75%), followed by

EXHIBIT 4-4

Campground Summary

LOCATION	NUMBER OF SITES	% OF STUDY AREA
Emerson Bridge	10	1
Drumheller	490	40
Big Valley	44	3
Trochu	55	4
Morrin	40	3
Dinosaur Provincial Park	43	3
Bleriot	50	4
Rosedale	10	1
Carbon	15	1
Michichi	18	2
Rosebud	25	2
Little Fish Provincial Park	100	8
Brooks	339	28
TOTAL	1,239	100%



CAMPGROUNDS

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EXHIBIT
4-5

out-of-province (mostly Saskatchewan) and some U.S. patronage. Users are mostly families staying for 1 - 3 nights and using the Drumheller area as a temporary base for visiting local attractions. The smaller campgrounds in the study area, in other urban centres or rural locations, attract more local/regional and work crew patronage in addition to tourist patronage. With the exception of work crews, visits are usually overnight and restricted to pass-through traffic. Patronage at most Provincial Parks in the study area is predominantly Alberta-based, ranging from 98% at Little Fish Lake to 63% at Dinosaur. The exception is Tillebrook which attracts a greater mix of Alberta, out-of-province and out-of-country users, due to its location near the Trans Canada Highway.

There is an even distribution of small (10 - 19 sites) and moderately (20 - 60 sites) sized campgrounds (8 in each category). The smaller campgrounds are exclusively local municipal or Provincially-operated day use/campground areas on highway routes. The moderate sized campgrounds include private, Provincially-operated and Provincial Park campgrounds. There are five larger campgrounds (100 - 200 sites), which are either Provincial Parks or privately operated. They are all located near larger urban centres on high traffic volume corridors.

The majority of campgrounds are Provincially-operated as Provincial Parks or Alberta Parks and Recreation/Transportation recreation areas. Four of the six Provincial Parks in the study area have campground facilities, with three of these being in the Brooks region. There are seven municipal campgrounds, that are either in a small urban centre or area former Provincial-operated recreation areas that have been taken over by local municipalities. There are four private campgrounds, all in the Drumheller area. Therefore there is an absence of private campgrounds in the rest of the study area as well as a lack of municipal campgrounds in the southern part of the study area.

Services provided by campgrounds in the study area vary significantly by size, ownership and location. Only in some of the private campgrounds near Drumheller are a full range of services offered (partial to full hook-ups, dump station, groceries, laundry, flush toilets, showers, shelters and recreation opportunities). However, there still appears to be a particular lack of on-site, family-oriented recreation opportunities at some campgrounds where patrons stay more than one night. The larger campgrounds in the study area provide the greatest variety of services. However, there is a lack of full and partially serviced hook-ups in the study area campgrounds. A number of municipal and private campgrounds are considering the provision of more full or partially serviced sites. Among campgrounds with a range of hook-ups, the greatest demand is for partial services (power/water or power). Small municipal campgrounds and Provincially-operated campgrounds/day use areas offer only basic services (shelter, washrooms, unserviced sites).

A qualitative ranking system was established for campgrounds in the study area. The rankings include: 1 (above average), 2 (average), 3 (below average) and 4 (poor). The ranking for individual campgrounds is detailed in the tables found in Appendix C. The ranking criteria included extent of services and amenities, aesthetics and location.

The majority of campgrounds in the study area were of poor to below average quality, due to the lack of services and amenities. There is a lack of scenic, well located (proximity to attractions, etc.) and fully serviced campgrounds. The lack of quality is of particular concern for the private campgrounds in Drumheller.

A ranking system was also established for the development potential of campgrounds. Rankings included: good potential, moderate potential, low potential. Rankings for individual campgrounds are detailed in the tables found in Appendix C. The ranking criteria included adjacent land uses, access, proximity to services/attractions, site attractiveness and available land for expansion.

Certain Provincial Parks and private campgrounds had the highest development potential, while the small municipal campgrounds generally had the lowest potential. Those of moderate potential ranged from rural location, Provincially or municipally-operated, private or Provincial Park campgrounds.

Several municipal campgrounds have tentative plans to either upgrade facilities, expand the number of sites or provide full services. Three private campgrounds in Drumheller (the fourth was closed in 1988) have indicated plans for upgrading and providing additional services. In two cases, increased sites and/or conversion to serviced hook-ups was planned. The City of Drumheller have tentative plans for a 50 - 60 site campground at an existing municipal park; Newcastle Beach. It is expected that this would involve the provision of serviced and unserviced hook-ups as well as additional facility services and recreational opportunities.

In Brooks, the Kinsmen organization is in the process to developing the existing 8 ha rodeo grounds for a group camping destination facility. Existing ball diamonds and golf course will be complemented by a new multipurpose building (cookhouse, etc.) and upgraded washroom, concession stand. It is part of a 5 year program that is beginning with a first phase in 1989. The site is located at the east end of town.

In the Provincial Parks, medium to long-term campground expansion has the identified potential to occur in Dry Island Buffalo Jump (at existing Tolman Bridge), and Dinosaur and Tillebrook Provincial Parks. At Tillebrook, capacity could be expanded to 300 sites, up from 200.

4.2.3 Food Services

The greatest concentration of food services are in the two large urban centres, Drumheller and Brooks. In Drumheller there are some 26 food service facilities (take-out and sit-down dining) with a limited variety of quality and pricing. Most restaurants have average-sized capacity (50 - 70 patrons). With the exception of the private Elk's Club and one other restaurant, there is a lack of food service facilities for large groups. In Brooks there are approximately 20 - 25 take-out and sit-down restaurant facilities. Similar limitations to Drumheller exist, with respect to capacity and quality. In both centres there is a lack of high-end dining facilities.

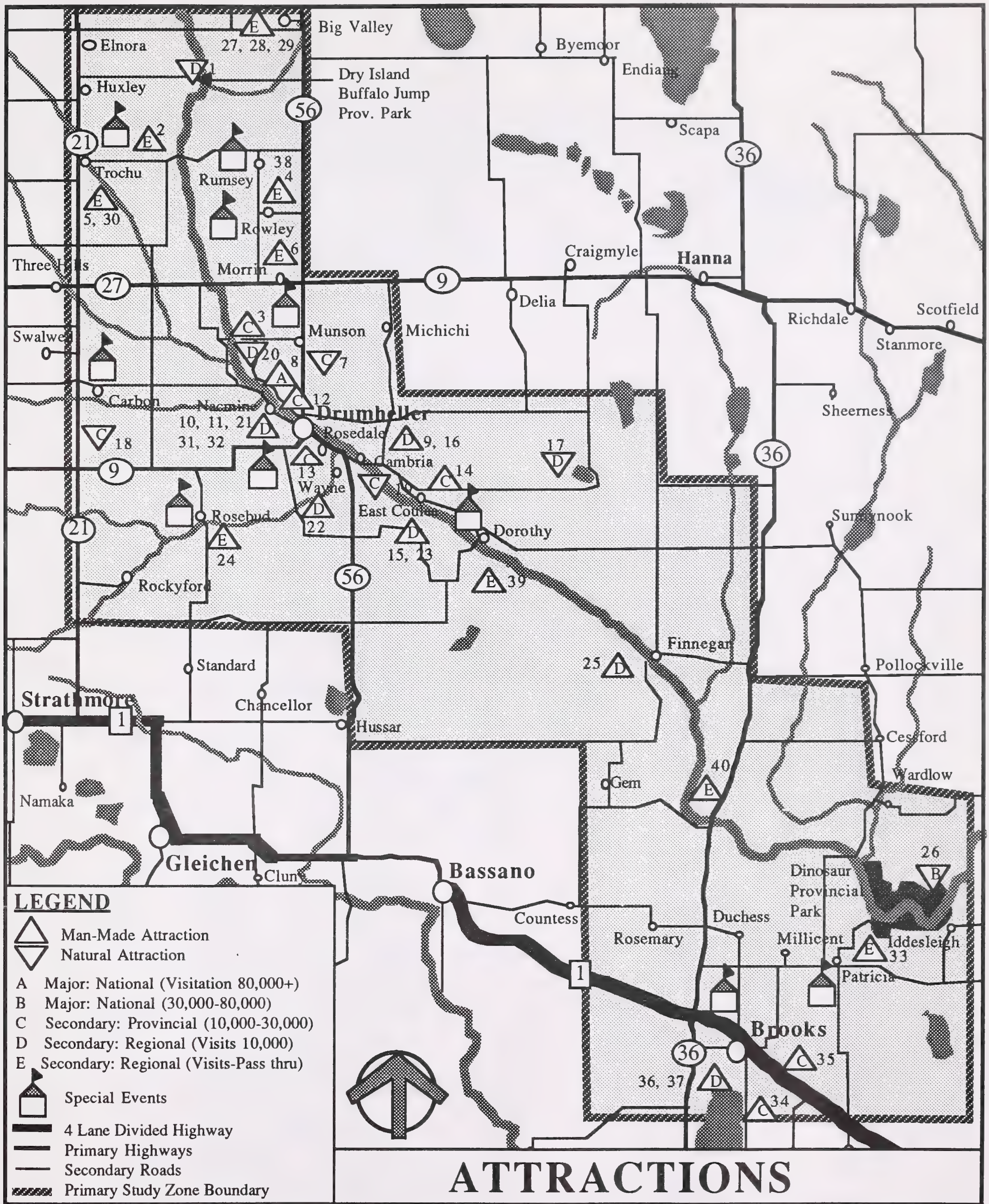
Most smaller urban centres in the study area have at least one restaurant, however, they are generally of average to below average quality and are quite small. This presents a restriction to tourism patronage.

4.3 TOURISM ATTRACTIONS

4.3.1 Introduction

This section summarizes the tourism attractions in the study area. The location of the attractions are depicted in Exhibit 4-6.

The following is a rating system used to describe and categorize all tourism attractions.



ATTRACTIONS

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EXHIBIT
4 - 6

KEY (FOR EXHIBIT 4-6)

ATTRACTIONS	
NAME	MAP REFERENCE NUMBER
Dry Island Buffalo Jump Provincial Park	1
T.L. Bar Guest Ranch	2
Bleriot Ferry	3
Yesteryear Artifacts Museum	4
Trochu Valley Historical Museum	5
Pioneer Sod House	6
Midland Provincial Park	7
Tyrrell Museum	8
Buffalo Trail	9
Prehistoric Park	10
Tyrannosaurus Rex	11
Little Church	12
Homestead Antique Museum	13
East Coulee School Museum	14
Atlas Coal Mine	15
Rosedale Suspension Bridge	16
Little Fish Provincial Park	17
Horseshoe Canyone	18
Hoodoos	19
Horsethief Canyon	20
Dinosaur Trail	21
Wayne Townsite	22

continued/...

ATTRACTIONS	
NAME	MAP REFERENCE NUMBER
East Coulee Tressel Bridge	23
Rosebud Centennial Museum	24
Finnegan Ferry	25
Dinosaur Provincial Park	26
Round House	27
St. Edmunds Church	28
Big Valley Museum	29
St. Annes Church	30
Prehistoric Park	31
Dry Canyon Trading Post & Petting Zoo	32
Whispering Creek Petting Ranch	33
Brooks Aqueduct	34
Alberta Horticultural Research Centre	35
Brooks Wildlife Centre	36
Brooks Historical Museum	37
Rumsey Cairn	38
Crawling Valley	39
Suitor Medicine Wheels	40

RATING	DESCRIPTION
A	Major attractions/recreation areas/landmarks of national recognition and importance which encourage visitations in excess of 80,000 persons yearly.
B	Major attractions/recreation areas/landmarks of national recognition and importance which encourage potential visitations of 30,000 - 80,000 persons yearly.
C	Secondary attractions/recreation areas/landmarks of provincial recognition/significance which encourage potential visitations of 10,000 - 30,000 persons yearly.
D	Secondary attractions/recreation areas/landmarks of regional recognition/significance which encourage visitations of up to 10,000 persons yearly.
E	Secondary attractions/recreation areas/landmarks of regional recognition/significance which encourage visitations on a "pass-through" basis only.

The above rating system is based on a similar one developed in the Chinook Country Tourist Association Marketing Plan.

4.3.2 Attractions

Drumheller and the immediate area have the greatest variety and concentration of attractions. These include man-made attractions such as the Tyrrell Museum, Homestead Antique Museum, Prehistoric Park, Buffalo Trail, Rosedale Suspension Bridge, Tyrannosaurus Rex, Atlas Coal Mine and East Coulee Tressel Bridge. Natural attractions include the Hoodoos, Horsethief Canyon, Horseshoe Canyon and Midland Provincial Park. There have been no new attractions developed in this region for approximately 20 years. The attractions are located either in town or on identified tourism routes (i.e., Dinosaur Trail). Most attractions are oriented to the Red Deer River valley, due to their relationship with coal mining history or archaeology.

In Brooks and the immediate area there is also a significant concentration of attractions. These include natural attractions such as Dinosaur, Kinbrook and Tillebrook Provincial Parks. Man-made attractions, mostly located in town, include the Aqueduct, Wildlife Centre, Brooks Museum, Alberta Special Crops and Horticultural Research Centre and Whispering Creek Petting Ranch.

The Tyrrell Museum is the major tourism generator in the study area, attracting approximately 500,000 persons per year. The various man-made and natural secondary attractions in the vicinity of the Tyrrell Museum and Drumheller draw in the range of 10,000 - 40,000 visitors per season. Visitation to many of these secondary attractions is adversely affected due to a lack of awareness by Tyrrell-bound visitors. Secondary attractions in the smaller urban centres further removed from Drumheller attract between 1,000 - 2,000 visitors. In the southern half of the study area, Dinosaur Provincial Park attracts approximately 43,000 visitors per year. The other Provincial Parks attract between 8,000 (Dry Island Buffalo Jump) to 74,000 (Kinbrook) annual visitors. Attractions in Brooks average 3,000 - 5,000 annual visitors.

Patronage origin and trip purposes vary by attraction location and scale in the study area. Visitors to the Tyrrell Museum are predominantly Alberta-based (60%), followed by out-of-province, U.S. and European tourists. Tyrrell visitors (and hence other Drumheller area attractions) can be either destination-oriented or visit on a pass-through basis. Many visitors to other Drumheller area attractions are generally staying for a longer period of time in the area. A notable concern is that day-trip visitors to the area will visit only the Tyrrell Museum.

Patronage to the secondary cultural/historical attractions in smaller urban centres is from regional, pass-through or temporary Drumheller-based visitors. The secondary attractions in Brooks receive, in order, the following patronage: Alberta-based, out-of-province (mostly Saskatchewan, Manitoba) and Trans Canada Highway pass-through traffic.

Patronage at the Provincial Parks exhibit a variety of characteristics. Dinosaur Provincial Park has a wider tourism appeal, attracting a broad base of Alberta, out-of-province and out-of-country visitors. Tillebrook, due to its proximity to the Trans Canada Highway, also attracts a wide origin base of patronage. Kinbrook, Little Fish Lake and Dry Island Buffalo Jump are almost exclusively visited by Alberta-based patrons.

There is a wide range of different scale attractions. The study area is anchored by two major attractions; the Tyrrell Museum and Dinosaur Provincial Park. The Tyrrell Museum has greater regional support of numerous man-made and natural secondary attractions. One concern is that most of the man-made secondary attractions are seasonal. To a lesser extent, there are secondary attractions in Brooks, which complement Dinosaur Provincial Park.

In the northern part of the study area, excluding the Drumheller area, there is a number of cultural/historical secondary attractions of local and regional significance. However, there is a lack of complementary services to these attractions (quality and/or extent). Also, many of these small, local attractions lack sufficient awareness by tourists. Many are not adequately accessible to tourists on weekends, evenings or off-season.

In the southern part of the study area, excluding Brooks, there is a lack of secondary attractions in general, that would complement Dinosaur Provincial Park. There is a lack of attractions which complement the theme of the Park.

A ranking system was established for the development potential of attractions in the study area. Rankings for individual attractions are detailed in the tables found in Appendix C. The ranking criteria included room for physical expansion, nature/quality and aesthetic qualities. To a much lesser extent the regional locational context was taken into consideration.

Proposed

Several complementary attractions, as well as the five identified potential tourism attraction generators, are being proposed for development in the study area.

Tourism Generators

Potential development at Dinosaur, Midland and Dry Island Buffalo Jump Provincial Parks would serve as provincial tourism generators for the study area.

A master plan was prepared for Dinosaur Provincial Park in 1986. Facility development/enhancement would include a new visitor centre (addition to existing Tyrrell Field Station), redeveloped and expanded campground (inclusion of serviced sites), upgraded day use area, a transit tour system serving all park facilities and attractions, upgrading of existing roads, utilities and administration facilities, and a private concession building (featuring groceries, restaurant, bike rentals, souvenir shop). Such development of the park would allow for a future capacity of 125,000. Implementation of the plan would involve a four to five year program. Total capital expenditure would be approximately $11.5 million, if fully implemented.

At Dry Island Buffalo Jump Provincial Park, there has been a recent acquisition of a 650 ha block of private lands that would allow for the expansion and linkage of the existing park to the Tolman Bridge. The bridge is south of the existing park, in the Red Deer River Valley. With an existing campground and adjacent to to Secondary Road 585, Tolman Bridge would become the major entry point to the park. The campground could be enhanced and expanded, and private sector service opportunities could be encouraged within the park (i.e., rafting tours). The TL Bar Guest Ranch, adjacent to the Tolman Bridge, could be further developed as a joint venture with Recreation and Parks, in order to provide equestrian service opportunities. The park would not be as extensively developed as Dinosaur Provincial Park. Total capital expenditure required would be approximately $2.5 million.

There is no master plan at present for Midland Provincial Park. There are tentative plans for small-scale facility enhancement/development. This could include an expanded trail system (i.e., new trails to tablelands and additional interpretive material) that presently uses the Tyrrell Museum as a trailhead. There is a demand for day use picnicking facilities at the Tyrrell, which is currently not met. There is potential for further development of McMullen Island, which could meet this demand.

The Atlas Coal Mine, an identified regional tourism generator, is being rehabilitated by the Dinosaur Valley Heritage Society. Short-term plans will see the development of underground mine tours by 1990 - 91. Additional interpretive facilities will also be included. These opportunities would be of regional and provincial significance.

An inter-departmental task force (Alberta Tourism, and Economic Development and Trade) has completed a feasibility study for a Calgary to Drumheller steam train excursion. It would involve the use of an existing railway right-of-way. Projected patronage would be 116,000 annual users. The excursions would operate on a day use seasonal basis. The Drumheller

Valley Heritage Society is also investigating the development of a similar opportunity between Drumheller and East Coulee. To date there has been no detailed feasibility work carried out.

Attractions

The Dinosaur Valley Heritage is also proposing short and long-term upgrading of the East Coulee School Museum. This would involve an expanded mine display component, other historical displays, a dinner theatre operation (proposed 180-seat theatre).

In Drumheller, Reptile World will be relocating from Strathmore to a site adjacent to Highway 9 by 1989. It is a secondary attraction of regional/ provincial significance.

Tillebrook Provincial Park, at this time, has only broad, conceptual plans for increasing campground capacity to 300 sites (increase of 50%). However, there are no definitive plans or justifications to implement campground expansion or other facility development in the near future. The park is intended to remain as a highway stop-over. Campground demand is directly proportional to Trans-Canada Highway traffic volume. Therefore, facility expansion will only occur as a result of increased camping demand from future traffic volume increases.

Kinbrook Island Provincial Park is in the process of redevelopment. The island, which is the focal point of the park, will receive a new boat launch and beach facilities. Campground expansion has already taken place. Redevelopment of the park has been ongoing since 1985 and is two years from completion (1991). Total capital expenditures are approximately $2.5 million. The park will remain as a high use, regional destination/ attraction. Further, park service/facility opportunities could focus on increased boating usage (i.e., good quality lake for sailing; potential to draw further users from Calgary).

Little Fish Lake Provincial Park is located on a lake that is in a state of physical decline (i.e., receding water base, increased nutrient concentrations). Cost-benefit analyses for stabilizing the lake indicate that it would not be financially practical. There is some potential for interpretive/hiking opportunities on the adjacent Ecological Reserve, recently established by Recreation and Parks (a management plan is presently being developed). Although there are no definite plans, Recreation and Parks are considering relocation of the park to the Barken House Reservoir, which is southwest of the present location, on the other side of the Red Deer River (Crawling Valley).

Natural scenic areas operated by Recreation and Parks, including the hoodoos, Horseshoe Canyon and Horsethief Canyon, are considered by the Department to have limited expansion opportunities, due to physical space constraints. There are tentative plans for quality upgrading of facilities, but at the same level of services as at present. Horsethief Canyon's viewpoint, which is on private lands, has the potential to be purchased by Recreation and Parks. Should this occur, some facility development could take place (i.e., washrooms, picnic tables).

4.3.3 Events

Numerous local and regional events provide additional opportunities and attractions for tourists. Events are based out of the urban centres in the study area. Including Drumheller there are nine communities that feature annual special events. All of these communities, with the exception of Brooks, are located in the northern half of the study area, and are therefore within reasonable proximity to the majority of tourist attractions.

Most of the special events are attracting between 2,000 and 5,000 visitors. The one exception is the Rosebud Dinner Theatre, which attracts approximately 10,000 - 15,000 visitors. All of the events are attracting a predominantly local/regional market.

Events are focused on sporting activities or cultural festivities. Sporting events include the Drumheller Combine and Car Crash Demolition, Western Canadian Hill Climb Championship and various rodeos. Cultural events include the Morrin Fair, Drumheller's Broncosaurus Days, Dinosaur Valley Heritage Days in East Coulee and the Rosebud Dinner Theatre. Most events are held during July and August, which coincides with the peak tourism season.

There is a lack of special events of major significance in the study area. In addition, there is a lack of events that take advantage of the cultural and resource themes of the area. With the exception of the Rosebud Dinner Theatre, special events do not provide adequate quality entertainment opportunities for tourists.

There are tentative plans by the Local Heritage Society to develop theatre facilities in the East Coulee School Museum. Interest in staging summer dinner theatre programs has been expressed by Calgary-based groups. The City of Drumheller will be expanding the number of special events in 1989. Included will be a Cruise Night (weekend activity) that will involve a street dance, antique car display and pancake breakfast.

4.4 TOURISM INFRASTRUCTURE

4.4.1 Municipal Servicing Constraints

Drumheller

Recent service upgrading includes a new sewage treatment plant and expanded water treatment and storage facilities. The present City population of 6,700 could be tripled through water capacity and doubled through sewage capacity. To summarize, the present level of municipal services present no constraints to urban growth in Drumheller.

Brooks

The Town is adequately serviced for sewer and water. A recent engineering study done for the Town indicated that the servicing capacity could accommodate a population of approximately 25,000 (up from present population of 10,000).

Region

There are numerous small towns, villages and hamlets in the study area. Big Valley and Morrin have adequate sewer and water capacity to potentially double their existing population.

The Hamlets of Nacmine and Rosedale are close to Drumheller and as such have partial (water) service connections to the City. In addition, they both have full sewer servicing. There are no constraints to growth with respect to servicing for either Hamlet.

Hamlets such as Rowley, Munson, Huxley, Patricia, Cambria, Gern, Rosemary, Duchess, Millicent and Michichi have constraints to growth in that there are no communal services. Servicing is provided through water wells and septic tanks.

East Coulee has a new sewage treatment plant with potential to service double the existing population. Water is provided from wells, however, there is adequate groundwater supply.

Carbon has the service capacity (sewage lagoon, water reservoir) to more than double their present population (429). The Town of Trochu has the service capacity to accommodate 25% more population/development growth.

4.4.2 Community Recreation Facilities

Drumheller

As the second largest urban centre in the study area, Drumheller offers a good range of local recreational facilities. The City features a Stampede and Agricultural Society Grounds, public golf course (9 holes) and driving range, three municipal parks (Centennial, Kinsmen and Newcastle Breach), an aquaplex (indoor and outdoor pools), tennis courts, and skating and curling arenas. Many of the facilities are close to major roads such as Dinosaur Trail and Highway 9, and services (motels, restaurants). The Recreation Complex provides convenient service to patrons because several facilities are clustered at one location. These include the arena and curling rink, the tennis courts, swimming pools, together with Centennial Park. There are City plans to expand the park facilities. Expansion of Newcastle Beach is also proposed, as is the golf course (9 to 18 holes).

Brooks

Brooks is the largest urban centre in the study area. It also offers a good range of local recreational facilities. A central Recreation Centre features curling and hockey surfaces, multi-use recreation facilities and indoor pool. There is also a privately-owned outdoor swimming pool in Town. Town recreation facilities also include a 9 hole golf course (presently being expanded to 18 holes) and 300 acres of local parkland (i.e., E.I.D. Park and Duke of Sutherland Park).

Region

Many of the other towns and villages in the study area offer recreational facilities. Trochu offers a swimming pool, curling rink, arena, local parks, tennis courts, 9 hole golf course and a community centre.

EXHIBIT 4-7

COMMUNITY RECREATION FACILITIES

LOCATION	FACILITIES
Drumheller	- 9-hole golf course - Aquaplex - Memorial Arena - curling rink - Newcastle Beach, Centennial Park, Kinsmen Park - Agricultural Society Grounds - driving range - tennis courts, ball diamonds
Brooks	- recreation centre (curling, skating) - tennis courts - outdoor and indoor swimming pool - tennis courts, ball diamonds, horseshoe pits - rollerskating rink
Rosebud	- community centre
Trochu	- curling rink, skating arena - playgrounds, tennis courts, ball diamonds - 9-hole golf course - fair grounds - outdoor running track
Morrin	- Sportsplex
Rumsey	- Agriplex
Carbon	- Sportsplex - municipal park

Smaller centres such as Carbon, Morrin, Rumsey and Rockyford have sportsplex (arena, etc.) facilities and local day use parks.

- Recreational Services

There is a variety of private recreational services available specifically to tourists.

In the Drumheller area there is an adventure tour outfit that offers horseback, bus and raft tours along the Red Deer River Valley. Another private operator offers helicopter tours.

4.4.3 Transportation Network

The regional transportation network is depicted in Exhibit 4-8.

Drumheller

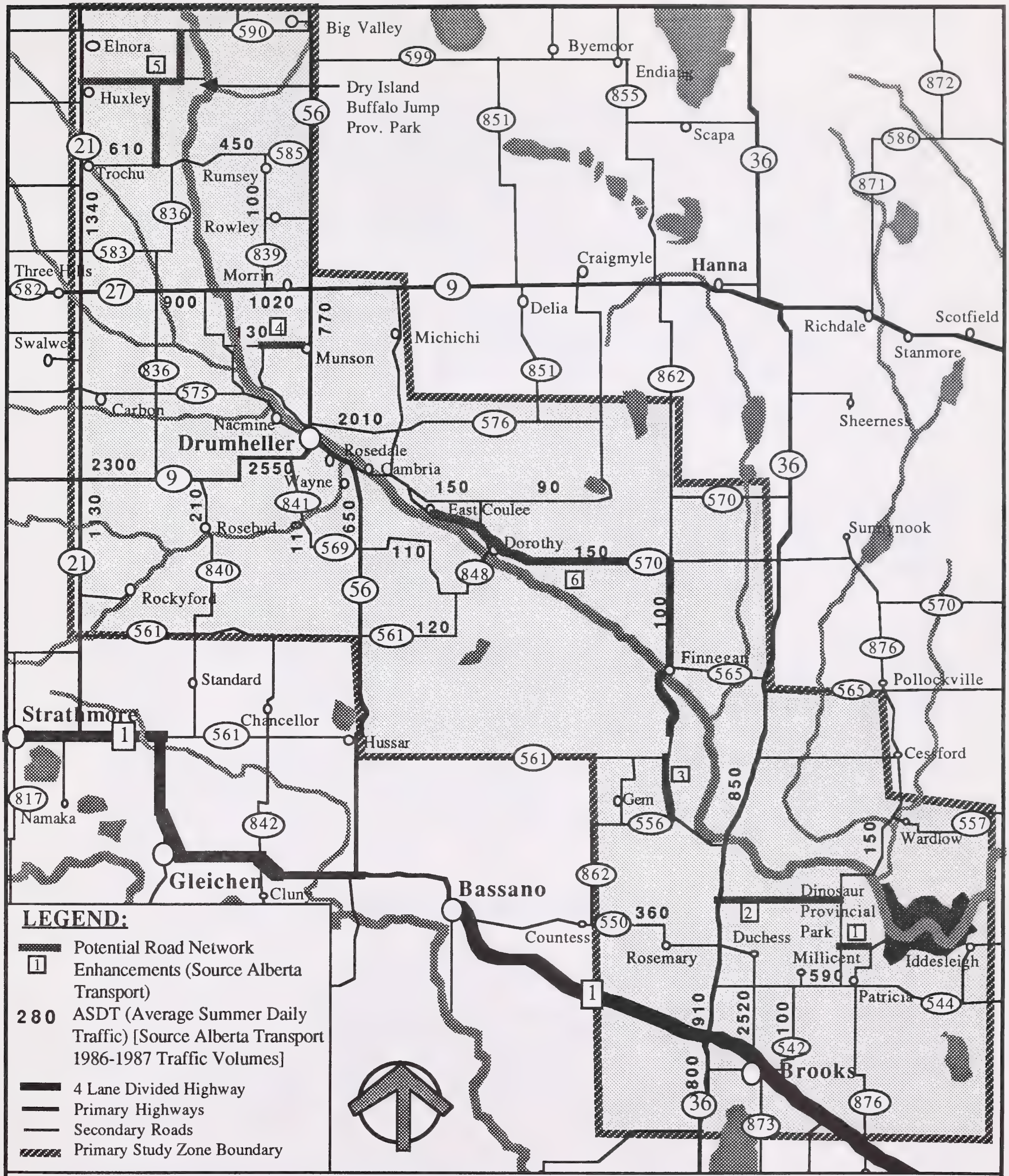
The City is well situated with respect to the regional road network. It is located at the Junction of Highways 9 and 56. The former is a major east/west provincial route; the latter provides north/south access in central Alberta. Highway 9 is a paved, two lane undivided route that has a narrow carriageway (no shoulders) and occasional poor surface conditions. Highway 56 is a good quality two lane, undivided route. North of the city is the Dinosaur Trail, which is a designated tourist circle route. Surface conditions are poor (gravel) north of the Tyrrell Museum, however there are tentative plans by rural municipalities to pave these sections.

Brooks

Brooks is well situated at the Junction of the east/west Trans Canada Highway and the north/south Highway 36. The Trans Canada is a high traffic volume four lane, divided route, while Highway 36 is a two lane, undivided route.

Region

The study area to the east is bounded by Highway 21, which is a good quality two lane, undivided north/south route. Further east is Highway 36, similar to Highway 21, which travels through the study area and connects to Brooks. Highway 27 is another east/west good quality two lane undivided route crossing through the northern part of the study area.



REGIONAL TRANSPORTATION NETWORK

IBI
GROUP

DRUMHELLER / DINOSAUR CORRIDOR
Tourism Destination Resort Plan

EXHIBIT
4-8

There are numerous Secondary Roads in the study area, most of which are only gravel-surfaced or base-coarsed. Many of the small urban centre and rural attractions are served by such roads. One of the major deficiencies in the study area is of the absence of a direct road link between Drumheller and Dinosaur Provincial Park. Presently, access east of the river is derived by travelling east along Highway 9 and south along Highway 36 or alternatively, along a series of poor quality signed municipal and secondary roads southeast of Drumheller. West of the river, access is derived by travelling south along Highway 56 and then east along the Trans Canada Highway. Use of the primary highways in both cases, considerably increases the length of travel between Drumheller and Dinosaur Provincial Park, whereas use of the secondary and municipal roads lacks scenic/aesthetic value and continuity.

The two Provincial Park anchors in the study area, Dinosaur and Dry Island Buffalo Jump, are located approximately 15 - 20 km from a primary highway. In both cases, access roads to the Park are in poor to fair surface condition, and require upgrading to a more acceptable standard.

Overall, there is a relatively adequate network of primary and secondary highways providing access to the study area's attractions; a good number of these are of poor quality. Direct access from Drumheller to the southern part of the study area is a notable deficiency in the overall system. Selected new additions to the road network along specific travel corridors and appropriate upgrading should overcome the problems as cited. These are further elaborated upon in the following section (4.4.4 - Proposed Transportation Improvements).

4.4.4 Proposed Transportation Improvements

The major concern to be addressed is a direct road linkage between Drumheller and Dinosaur Provincial Park, along the Red Deer River corridor. Alberta Transportation has conceptually identified locations where potential additions/upgrading to the existing road network would better serve tourism and the regional economy. The following is a list of potential additions that would address the major concern noted as well as others:

1. **Dinosaur Provincial Park Access Road** - A paved access road to provide better access to this Provincial Park is suggested. This would involve a short link to complement Item 2.

2. **Highway 36/S.R. 876 Connection** - A paved road connecting Highway 36 and S.R. 876 would provide better access from Highway 36 to Dinosaur Provincial Park. Work on potential routing has not been completed.

3. **S.R. 862 Re-alignment** - This is a re-alignment of S.R. 862 between S.R. 561 and S.R. 556 to accommodate a tourism route along the Red Deer River Valley. A study has been completed on this proposal.

4. **Munson Secondary Road Access** - This proposed secondary road between Highway 9 at Munson to S.R. 837 is to provide access to the Munson Ferry (a possible tourist attraction) and the Red Deer River Valley. A study has been completed on this proposal.

5. **Dry Island Buffalo Jump Provincial Park Access** - A paved road to provide better access to this Provincial Park is suggested. Currently, the only provincial approach to this park is from Highway 21. A provincial order road from S.R. 590 south to S.R. 585 would provide better access and facilitate recreation activity on the Red Deer River. Work on routing has not been completed.

6. **Red Deer Valley Road Links** - A roadway system could be developed in this area to connect historical points of interest to the current provincial road.

In reviewing these proposed improvements, it is our contention that high priority should be directed to the corridor connection between Drumheller and Dinosaur Provincial Park. This would include the identified Highway 36/S.R. 876 connection, S.R. 862 re-alignment and other Red Deer Valley road links. The S.R. 862 re-alignment is the only one of the three which is presently considered a high priority by Alberta Transportation, and as such, could be completed within five years (although not presently in their construction schedule). The other linkages could be allocated to the five year framework if priorized accordingly.

The Munson secondary road access is considered a high priority by Alberta Transportation and could be completed within a five year framework. The Dry Island Buffalo Jump Provincial Park access roads have not been priorized by Alberta Transportation and will be until the park is developed. At that time it may not be considered a high priority since park development plans will orient most facilities and access off S.R. 585. The Dinosaur Provincial Park access road has not been priorized or scheduled for construction by Alberta Transportation; however, this should be considered a high priority since park development plans will likely be implemented by 1990.

It is extremely important that there by close coordination of road network planning/upgrading between Alberta Transportation, the local municipalities and all other agencies involved in tourism development in the study area. Further, it is necessary that agreement be reached on priorization of network improvements and the timing of the scheduled construction.

4.5 TOURISM PROGRAMS

4.5.1 Introduction

There are a number of recent and ongoing studies/programs which have relevance to the Drumheller/Dinosaur Corridor Destination Resort Plan. These are briefly summarized hereinafter.

4.5.2 Drumheller Community Tourism Action Plan/ Brooks Community Tourism Action Plan

The Plans identify tourism markets, tourism assets and concerns, tourism goals and objectives, and tourism action steps. Under the tourism concerns they identify some current deficiencies in the City/Town's tourism service/infrastructure and go on to recommend improvements to the same. Given the overlap in certain areas of the Destination Resort Plan and the D.C.T.A.P. it will be important to rationalize the findings/recommendations of these two documents.

4.5.3 Alberta Main Street Programme

This is a programme of the Alberta Historical Resources Foundation, with the assistance of Alberta Culture and Multi-Culturalism and the Heritage Canada Foundation. The aim of the programme is to strengthen the downtown business area and promote heritage conservation.

Drumheller is one of six communities in Alberta that are involved with the programme. A Resource Support Team provided an assessment and recommendations on heritage building resources, market data, commercial and economic development and project organization and management.

To date the Drumheller Main Street Programme has been responsible for funding marketing initiatives, market and retail surveys, a management assistance program and the interpretation/definition of the historical business area. In 1988 seven buildings in the downtown had restoration work done. It is expected that 11 more will be restored in 1989 and further buildings in 1990.

4.5.4 Big Country Tourist Association Marketing Plan/ Gateway Tourist Association Marketing Plan

The Plans provide a clear direction on zone marketing and promotion initiatives for the coming year by detailing specific recommendations for the development of a coherent marketing plan.

The Marketing Plans provide a mechanism and the strategic direction for a coordinated and concerted marketing effort within the zones. Their implementation will go a long way to enhancing opportunities for increased visitation to the zones. Notwithstanding, full effectiveness in terms of increased visitation and expenditures within the Dinosaur Corridor economic impact zone will require improvements to the existing tourism infrastructure and services as well as the addition of attractions within this area.

4.6 SUMMARY

4.6.1 Accommodation

Fixed roof accommodation is primarily clustered in the larger urban centres in the study area, Drumheller and Brooks. Hotels/motels in Drumheller and the small urban centres are under-utilized to a significant degree in Brooks. In Brooks and Drumheller facilities are at or near capacity during the tourist peak season. Patronage is almost exclusively tourism-based for hotels/motels in Drumheller during peak season, however there is a greater mix of business-related patronage in the other urban centres. There is a significant lack of good quality, full service and amenity hotels/motels in the study area.

Campgrounds are the alternative form of purchased accommodation for tourists. There are a large number of sites available in the study area because of the Provincial Parks throughout and the concentration of private campgrounds in Drumheller. Occupancy is highest in the Drumheller area, where there is a significant lack of good quality, serviced campground sites. In the balance of the study area campgrounds are generally underutilized except on occasional summer or long weekends at selected sites. As with most hotels/motels there is a significant reduction in demand during the shoulder season. The study area in general has a mix of private, municipal and Provincial Park campgrounds near or in conjunction with area attractions. However, there is a lack of services associated with many campgrounds, thereby restricting visitors to short duration stays.

4.6.2 Food Services

A similar clustering pattern exists for restaurants, with Drumheller and Brooks having the greatest concentrations. Many restaurants require upgrading to better meet tourism needs. A notable constraint is that most restaurants in Drumheller and Brooks do not have the capacity to handle large groups of visitors.

4.6.3 Attractions

The major attractions in the study are are the Tyrrell Museum and Dinosaur Provincial Park (as well as future potential of Dry Island Buffalo Jump Provincial Park). There are a reasonable number of secondary attractions (man-made and natural) to complement the major attractions. Attractions are generally clustered in the Brooks and Drumheller regions. There is a lack of attractions between Drumheller and Dinosaur Provincial Park due to a lack of service and road infrastructure. Many of the secondary attractions require improved signage/awareness as well as some facility enhancement.

Almost all of the special events in the study area are local/regional in nature and do not tend to be well-connected to tourism promotion. However, there are efforts are present, particularly in Drumheller, to expand and enhance special events. Many special events, such as the Rosebud Dinner Theatre and the numerous rodeos have additional potential to provide tourism entertainment opportunities.

4.6.4 Services

Both Drumheller and Brooks have an adequate level of community recreation facilities as part of the general tourism infrastructure. In addition there are limited community recreation facilities provided in many of the smaller urban centres.

With respect to servicing (water, sewer, etc.) capacity that could limit or enhance development potential, both Drumheller and Brooks have no long-term constraints. Adequate developable areas exist in both communities. Few constraints exist in the smaller urban centres.

The primary and secondary highway network adequately serves the study area, providing access to most tourist services and attractions. However, more direct linkage must be provided between Drumheller and Dinosaur Provincial Park. In addition, there are selected roads accessing tourism services and/or attractions which require further upgrading or improvements.

5.0 TOURISM MARKET ASSESSMENT

The market assessment section includes a review of the existing tourism markets in the Big Country and Gateway Tourist Zones, a brief overview of potential markets, an examination of the market experience of the existing regional attractions, and visitation projections for the proposed improvement and development of the Provincial Park attractions. Secondary data sources were employed in the analysis throughout this section.

5.1 TRAVEL PATTERNS

Although a considerable amount of tourism-related research has been conducted in the area in the recent past, no single up-to-date source of data is available to define visitor profiles and visitation levels within the study area. Accordingly, the visitor profiles and visitation estimates which are developed in this section were derived from a variety of sources, including:

- the 1984 and 1986 Canadian Travel Surveys;
- the 1987/1988 Fiscal Year Provincial Park Statistical Summaries;
- the 1987 Drumheller Tourism Survey;
- the 1989 Tyrrell Museum of Paleontology Visitation Record;
- the 1988 Big Country Tourist Association Zone Marketing Plan;
- the 1988 Drumheller Tourism Development Study;
- the 1988 Gateway Tourist Association Marketing Plan; and
- other sources including visitor information centre statistics, highway traffic counts, etc.

The 1984 Canadian Travel Survey estimated total visitation to the Big Country Zone from Canadian origins at approximately 245,000 person trips. The corresponding 1986 Canadian Travel Survey estimate was 305,000 person trips, representing an increase of 25%. The 1984 travel survey estimated total Canadian origin travel of 611,000 person trips in the Gateway Zone. The 1986 survey estimate was 763,000, again representing an increase of

25%. However, due to sample size limitations, and the exclusion of non-Canadian person trips, these figures are believed to under-represent visitation by a significant margin.

The Tyrrell Museum of Paleontology compiles accurate monthly gate tallies of visitation. The Museum was opened to the public in September of 1985, and the pro-rated annual visitation was estimated at approximately 500,000 persons for that year. In 1986, visitation increased significantly to 560,000 but declined in 1987 to approximately 479,000 visitors. The 1988 visitation estimate was 491,000 visitors, which is equivalent to 96% of the opening year level of visitation. By comparing the Canadian Travel Survey visitation estimates with the Tyrrell Museum tallies, it is apparent that the Museum has more than doubled visitation to the Big Country Zone, and that it is by far the largest attraction in the study area.

Although the Tyrrell Museum is the largest attraction in the region, several other attractions have significant levels of visitation. These other attractions include:

ATTRACTION	ANNUAL VISITATION
Kinbrook Provincial Park	74,000
Dinosaur Provincial Park	43,000
Homestead Antique Museum	35,000
East Coulee School Museum	32,000
Tillebrook Provincial Park	21,000
Rosebud School of the Arts	13,000
Dinosaur and Fossil Museum	12,000
Prehistoric Park	11,000
Brooks Museum	10,000
Horseshoe Canyon	10,000
Hoodoos	10,000
Dry Island Provincial Park	8,000
Brooks Research Centre	8,000
Littlefish Provincial Park	5,000

5.2 VISITOR PROFILES

Three sources of data are available for developing a profile of visitors to the region: tourist information centre visitor statistics; the 1986 Travel Survey; and the 1987 Drumheller Tourism Survey. A broadly representative profile of visitors to the region was developed from these sources, and is discussed below, and summarized in Exhibit 5-1.

EXHIBIT 5-1

Regional Visitor Profile

VISITOR ORIGINS:

Intra Zone	5%
Calgary	22
Edmonton	13
Other Alberta	26
B.C.	8
Saskatchewan	6
Other Canada	9
U.S.A.	6
Other Foreign	5
TOTAL	100%

PARTY COMPOSITION:

Families/Relatives	61%
Couple	22
Friends	11
Other Non-Related Groups	2
Alone	2
Other	2
TOTAL	100%

AVERAGE PARKING SIZE - 3.6 Persons

TRIP DURATION IN THE REGION:

0 Nights	63%
1 Night	19
2 Nights	10
3+ Nights	8

AVERAGE OVERNIGHT TRIP DURATION - 1.8 Nights

ACCOMMODATION USED (USE WEIGHTED):

Hotel/Motel	33%
Campground	38
Home/Cottage	26
Other	3
TOTAL	100%

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continued/...

PRIMARY TRIP PURPOSE:

Museum Visitors:

Vacation	47%
Day Use Recreation	14
Personal Business	21
Other	18
TOTAL	100%

Other Visitors:

VFR	46%
Pleasure	41
Personal Business	9
Other	4
TOTAL	100%

ULTIMATE TRIP DESTINATION:

In Region	51%
Not In Region	49
TOTAL	100%

TRAVEL MODE:

Car/Truck	84%
R.V.	13
Charter Bus	2
Other	1
TOTAL	100%

SEASONAL DISTRIBUTION:

First Quarter	5%
Second Quarter	25
Third Quarter	62
Fourth Quarter	8
TOTAL	100%

continued/...

EXHIBIT 5-1

Regional Visitor Profile

VISITOR ORIGINS:

Intra Zone	5%
Calgary	22
Edmonton	13
Other Alberta	26
B.C.	8
Saskatchewan	6
Other Canada	9
U.S.A.	6
Other Foreign	5
TOTAL	100%

PARTY COMPOSITION:

Families/Relatives	61%
Couple	22
Friends	11
Other Non-Related Groups	2
Alone	2
Other	2
TOTAL	100%

AVERAGE PARTY SIZE - 3.6 Persons

TRIP DURATION IN THE REGION:

0 Nights	63%
1 Night	19
2 Nights	10
3+ Nights	8

AVERAGE OVERNIGHT TRIP DURATION - 1.8 Nights

ACCOMMODATION USED (USE WEIGHTED):

Hotel/Motel	33%
Campground	38
Home/Cottage	26
Other	3
TOTAL	100%

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continued/...

EXHIBIT 5-1 (continued)

AVERAGE DISTRIBUTION, ALL PARTIES:

Restaurant Meals	$14.70
Groceries	3.00
Accommodation	8.40
Automotive	7.10
Retail	6.10
Other	2.70
TOTAL	$42.00

Source: Compiled by IBI Group from Visitor Information Centre records, Canadian Travel Surveys, and Tyrrell Museum Visitor (Drumheller Tourism) Survey.

Although the area boasts world class attractions, the overwhelming majority of visitors (66%) are from Alberta origins, followed by other Canadian origins at 23%, and foreign origins at 11%.

The area is primarily appealing to family parties of three or more persons (61%), followed by couples (22%), and parties of friends (11%). The estimated average party size is 3.6 persons for parties visiting the Tyrrell Museum, and approximately 2.9 - 3.3 persons for visitors to other Provincial Parks.

Most visitors do not spend a night in the region (63%), while for the 37% of visitors who do spend a night in the region, the average trip duration is 1.8 nights. Overnight visitors tend to stay in campgrounds (38%) or hotels/motels (33%), while 26% stay in homes or cottages.

Visitors tend to travel to the region by automobile or truck (84%), or by R.V. (13%). The primary trip purpose tends to be pleasure/vacation, or to visit friends and relatives. Approximately half of the visitor parties have an ultimate trip destination within the region.

The seasonal distribution of visitors is strongly concentrated in the traditional summer vacation months of July and August, with the shoulder months of June and September accounting for a much lower proportion of the total number of visits. The third quarter of the year accounts for some 60% of the total number of visits, followed by the second quarter at 25%.

The Tyrrell Museum, which is the major attraction in the area, is attracting visitors who are unusually well educated, and who have higher than average household incomes. Approximately three quarters of the heads of visitor parties have at least some post-secondary education, and nearly 60% of the households have average annual incomes in excess of $40,000 (the estimated mean annual household income is $48,000). The Museum is also attracting older visitors, with an estimated mean age of party head of 45 years.

Daily party expenditure estimates were derived from the survey of visitors to the Museum. It should be noted that the following figures are estimates, and that they have been inflated to 1989 dollars. It is estimated that the visitor parties average expenditures of $25.00 per day, while overnight visitor parties average expenditures of $70.00 per day. The daily expenditure for all parties averages $42.00 per day, with significant expenditures made for restaurant meals, accommodation, automotive expenses, and retail purchases.

5.3 TOURISM GENERATOR VISITOR PROJECTIONS

Visitation projections for the three potential provincial-scale generators (Midland Provincial Park, Dinosaur Provincial Park and Dry Island Buffalo Jump Provincial Park) have been prepared by Alberta Recreation and Parks. Annual ridership on the proposed Calgary-Drumheller steam train has been estimated by Alberta Economic Development. For the other major regional attractions (Atlas Coal Mine Interpretive Centre and a family vacation/destination resort), potential visitation levels have been estimated by IBI Group. Both current and future visitation or usage levels for these major generators and attractions are depicted in Exhibit 5-2.

As indicated in that exhibit, the three provincial parks in the corridor are currently attracting some 61,000 day visitors, and 26,000 overnight campers, for an annual total of approximately 87,000 person visits. The total projected visitation for the three parks is 250,000 day visitors (an increase of 300%) and a total of 132,000 camper nights (an increase of 400%), for a total visitation projection of 382,000 person visits (an increase of approximately 340%).

The Calgary-Drumheller steam train proposal was examined jointly by Alberta Economic Development and Alberta Tourism. The study estimated potential annual ridership at 116,700 person trips. Although shorter route steam train tours have been proposed in the Red Deer River Valley (including routes from Drumheller to East Coulee and a narrow-gauge route from East Coulee to Finnigan), none of the sources contacted were aware of the existence of any formal feasibility work for these routes.

The Atlas Coal Mine Interpretive Centre is currently attracting visitation of approximately 30,000 persons per annum. On completion of the proposed underground tour facility and improvement of the headwork facilities, IBI Group is conservatively estimating annual visitation at 75,000 persons, which represents and increase of 150%. However, the Atlas Coal Mine is likely to serve as an attraction to visitors already in the region, rather than as a generator of trips to the region.

Although a detailed feasibility study would obviously be required, the preliminary indications are that a family vacation/destination resort, offer-

EXHIBIT 5-2

Major Attraction Visitation Projections

GENERATOR/ATTRACTION		CURRENT PERSON VISITS PER ANNUM	PROJECTED PERSON VISITS PER ANNUM
Midland Provincial Park: (excluding Tyrrell Museum)	Day Use	10,000	22,000
	Overnight Use	7,200	11,700
	Total[1]	17,200	33,700
Dinosaur Provincial Park	Day Use	43,000	129,000
	Overnight Use	18,400	54,400
	Total[1]	61,400	183,400
Dry Island Buffalo Jump Provincial Park	Day Use	8,000	99,000
	Overnight Use	0	66,000
	Total[1]	8,000	165,000
Calgary-Drumheller Steam Train	Day Use	0	73,500
	Overnight Use	0	42,200
	Total[2]	0	116,700
Atlas Coal Mine Interpretive Centre	Day Use[3]	30,000	75,000
Family Vacation/ Destination Resort	Day Use	0	10,000
	Overnight Use	0	20,000
	Total[3]	0	30,000
TOTAL	Day Use	91,000	408,500
	Overnight Use	25,600	195,300
	Total	116,600	603,800

1. Estimates by Alberta Recreation and Parks.
2. Estimate by Alberta Economic Development.
3. Estimates by IBI Group.

ing a mix of day use attractions and good overnight fixed roof and campground facilities, would be viable in the near future in the study area. Accordingly, for the purposes of this report, IBI Group is projecting visitation at a family destination resort of 10,000 person day visits and 20,000 overnight visits, for a total of 30,000 annual person visits.

Although other potential regional generators have been identified, including an IMAX theatre at the Tyrrell Museum and a Dinosaur Country resort development, no formal feasibility work has been undertaken. For this reason, visitation projections have not been undertaken and no other information is available, so these potential generators have been excluded from further analysis.

At present, the tourism generators and attractions noted above account for approximately 91,000 day person visits and 26,000 overnight person visits, for a total of 117,000 person visits per annum. The visitation projections noted above would result in the total day visit estimate of approximately 452,000 persons, with 152,000 overnight person visits, for a total of approximately 604,000 person visits per annum.

The visitation projections employed represent a very substantial increase in both day use and overnight use in the region. However, this substantial increase should be considered within the context of the recent surge in visitation to the region which was generated by the Tyrrell Museum. When considered within that context, and also considering the current shortage of secondary day use attractions and quality overnight accommodations in the region, it is apparent that the visitation projections may represent an achievable long-term goal.

6.0 TOURISM DEVELOPMENT OPPORTUNITIES

6.1 INTRODUCTION

The ensuing section addresses the adequacy of the current level of supply of tourism products and services to meet the potential tourist market requirements. It is based on a synthesis of tourism inventory (supply) and tourism market (demand) data as previously detailed. This section also highlights opportunities for enhancements to the existing tourism resources and potential additions to the resource base resulting from the development of the various tourism generators identified in the Dinosaur Country Corridor.

6.2 ASSESSMENT OF CURRENT LEVEL OF SUPPLY

The current level of supply is assessed under the following headings: infrastructure, services and attractions.

6.2.1 Infrastructure

Utilities

- There are adequate levels of utility servicing throughout urban centres in the study area. In particular, the larger centres of Drumheller (and immediate area hamlets) and Brooks utility servicing systems do not pose constraints to additional development.

Transportation Network

- The transportation network within the region is generally good with most roads and highways being of adequate standard to meet traffic volume needs.

- Certain new road linkages, as identified by Alberta Transportation, are required to better serve tourism and local economic needs of the region. Of particular note is the lack of direct linkage along the Red Deer River between Drumheller and Dinosaur Provincial Park.

- Given the narrow and unsurfaced shoulder conditions in most of the highways throughout the region, the addition of "turn-outs" in selected locations would greatly improve conditions for tourist traffic, particularly over-sized vehicles and trailers.

- Current poor surface conditions necessitate the upgrading of the Dinosaur Trail tourist route.

Tourist Information/Signage

- The lack of a coordinated tourism signage program is a deficiency of significant proportions and is an impediment to full realization of tourism potential, not only in the Dinosaur Country region, but throughout the Province. It should be noted that there is no Drumheller identification associated with the Tyrrell Museum highway signage. Further, directional signage, particularly for attractions, within the region itself is inadequate.

- The major tourism generators in the region, particularly the Tyrrell Museum and Dinosaur Provincial Park, will function not only as attractions in their own right, but as regional distributors of visitor traffic. This critical function must not be under-estimated in the conceptualization and delivery of tourism information services. At present, there is a significant deficiency on the part of both the above attractions in providing this critical function.

- There is a definite lack of support from smaller, regional tourist information outlets in providing comprehensive tourism information services for the entire Dinosaur Country tourist region.

- The present City-operated tourist information booths in Drumheller are under-sized and inadequately located. They are currently located amongst other existing and proposed land uses and buildings at the bottom of the steep river table lands. Hence, access is awkward, parking is confusing and there is a lack of effective visual presentation.

- There is a lack of adequate regional identification/entry points as well as site specific signage for many of the areas' secondary attractions. What signage exists, lacks a coordinated and themed approach.

- Given the "Dinosaurs and More" marketing theme recently adopted by Zone 3, and the very strong general appeal of dinosaurs, major identity features including large-scale model dinosaurs should be developed at the entries to the region. These sites could also include large-scale maps and additional information of individual attractions as well as picnic tables, landscaping, etc. Logical locations would include Highways 2 and 9, and the Trans Canada and 873/36.

Brochure/Advertising

- There is a lack of high quality brochure material for many of the secondary attractions. This is necessary to support the previously noted need for increased and coordinated distribution to tourists.

Recreational Facilities

- There appears to be an adequate level of community recreational facilities to provide recreational opportunities for tourists.

- There is a lack of specialized, unique experience-related recreational services and activities available to tourists in the study area, including the major tourism nodes (Drumheller and Dinosaur Provincial Park/ Brooks). In particular such services could take better advantage of the Red Deer River for such opportunities as rafting, canoeing, etc.

6.2.2 Services

Hotels/Motels

- The available data is insufficient to calculate the deficiency in supply of hotel and motel units. However, given peak season occupancy of near 100% in both Drumheller and Brooks it is obvious that additional supply is required.

- Some of this unsatisfied demand could be accommodated in smaller units throughout the study area if facilities are substantially upgraded.

- Accommodation within the region - with the exception of one or two marginal facilities in Brooks and Drumheller - is not of adequate quality. While price sensitive demand is being served, tourists who are seeking a higher quality experience may tend to bypass the area. This is particularly important given the visitation profile trends (out-of-country, above average economic background of Alberta-based visitors). Unfortunately, the low level of off-season visitation reduces the financial viability of higher amenity types of facilities.

- All accommodation facilities within the region are lacking family-oriented, recreation/entertainment amenities. These will be extremely important, particularly within the larger centres, in keeping tourists in the are for a longer duration.

- There is considerable scope to improve existing facilities within the area. In addition, there is a good opportunity for the creation of more specialized accommodation products which offer unique experiences, i.e., bed and breakfast, guest ranches, etc.

Campgrounds

- Although excess supply exists during the peak season it is primarily a function of the poor quality/lack of services in the available product rather than a lack of demand. In addition, as repeat visitation to the Tyrrell Museum continues, demand for quality camping facilities is expected to increase. Consequently, there is scope to add to the inventory in locations throughout the studya area.

- It is anticipated that the majority of the increased demand can be accommodated in the planned expansion of the Provincial Parks.

- From a qualitative standpoint, there is considerable latitude for upgrading existing facilities, i.e., provision of additional serviced hook-ups, amenities and activities. This is particularly true for the campgrounds benefitting from their close proximity to area attractions. Only through the provision of a broader range of services will tourists be encouraged to stay overnight in the area and extend the lengths of their stay.

Restaurants

- Considerable scope exists for the provision of tourist-oriented food services. Restaurants are generally not oriented to visitor requirements. A notable constraint to most restaurants in the study area is that they do not have the capacity to handle large groups of visitors.

- Good opportunities exist for the provision of unique eating experiences, seasonal specialty outlets such as ice cream and confections, family or higher profile chain restaurants, and higher end dining facilities.

- From a qualitative standpoint, there is some latitude for the upgrading of existing facilities.

Retail Goods

- The wide variety of goods and services available in Drumheller and Brooks does not necessitate the addition of DSTM (department store-type merchandise) facilities at this time; however, increasing tourism visitation to the area should necessitate the provision of specialized tourist-oriented retail outlets (i.e., sportswear, gifts/souvenirs, books/magazines, authentic crafts, etc.).

- The limited summer hours of operation (no evenings) for retail outlets in Drumheller is a lost opportunity in terms of capturing additional tourism expenditures and providing night time activities.

Automobile Service

- Drumheller, Brooks and the other towns and villages in the study area offer a variety of independent and manufacturer-affiliated major service facilities, in addition to a large number of fuel and minor service facilities. It is therefore anticipated that further development of the major tourism generators will not require additional automobile service facilities.

6.2.3 Attractions

- With the exception of the Drumheller and Brooks regions, the study area has a limited number of attractions. Outside the major urban centres and the Provincial Parks, the attractions are widely dispersed. Day trip opportunities (based out of Drumheller) are limited due to this overall deficiency and lack of clustering. The southern part of the study area is notably deficient in tourism attractions of any sort.

- There is latitude for the upgrading of many of the man-made secondary attractions in the study area, particularly in Drumheller and the smaller urban centres. With the exception of the proposed Reptile World in Drumheller, there has been a general lack of any new attractions in the study area for a considerable period of time.

- Further development of Dry Island Buffalo Jump and Dinosaur Provincial Parks will provide the study area with strong attraction anchors at either end of the corridor. However, this must be further enhanced by the development of quality road linkages.

- Excepting the major attractions of Dinosaur Provincial Park and the Tyrrell Museum, there is a significant lack of awareness of other attractions in the study area. This has helped to limit tourism to day trip or single night visitation.

- There is notable lack of activities, particularly night time activities, within Drumheller. This deficiency will cause a loss of large numbers of museum visitors, in particular, to other centres with an associated loss of potential accommodation and related expenditures. Consequently, there is a requirement for the addition of attractions/activities/events that will encourage visitors to either extend their day use activities, stay overnight or plan a return trip.

- Many of the smaller, secondary attractions are seasonal in nature further serving to constrain the off-season tourism appeal of the area.

- There is considerable scope for additional special events which are oriented to tourists as well as regional users. A large number of these are further elaborated upon in the Drumheller Community Tourism Action Plan which provides an implementation strategy for the enhancement to promotion of existing special events which should assist in complementing tourism within the region.

- Achieving a critical mass of attractions within the study are will require a number of initiatives including:

    - enhancement of existing attractions;
    - packaging/promotion of existing attractions;
    - addition of attractions/activities; and
    - marketing and management of existing and proposed attractions.

- There is latitude for enhancement opportunities at the Tyrrell Museum. These would be within the areas of exhibits and programming, facility and visitor services, and marketing and promotion.

- There are additional natural, native culture and mining history resources in the Red Deer River Valley corridor which could be utilized, developed and promoted as tourism attractions.

6.3 TOURISM DEVELOPMENT OPPORTUNITIES

The following section is devoted to an examination of potential tourism and related opportunities for the study area. It is based on a synthesis of data from the tourism inventory, the market assessment and the assessment of the quality and quantity of existing tourism services, infrastructure and attractions. These varied sources have helped guide the creative processes involved in identifying and articulating tourism development opportunities resulting from the identified tourism generators.

Tourism development opportunities are summarized in Exhibit 6-1. Potential opportunity types are briefly described; where possible, specific locations are detailed along with operating sector/agency responsibility and priority with respect to implementation. Priority has been ranked from 1 to 5 with 1 being the highest priority.

6.4 DESTINATION RESORT OPPORTUNITIES

The family vacation destination resort plan, a concept program of Alberta Tourism, was identified as a potential private sector opportunity for the Drumheller/Dinosaur Corridor area. The typical resort, as envisioned by Travel Alberta, would serve as a "visitor destination", providing complete services for tourists, including overnight facilities and recreation facilities. Specifically, these could include serviced and unserviced campsites; group camping area, playgrounds, tennis courts, golf course, interpretive centre, water-based recreation opportunities, service station, trailer/car rentals, etc.

Three potential sites were identified near Drumheller, one in the hamlet of Nacmine, one in Drumheller itself, and the other adjacent to the Hoodoos on Highway 10 (see Exhibits 6-2 through 6-6). A fourth, in Brooks, is already being developed along these concept lines.

There were a number of criteria used to identify sites for a potential family vacation destination resort. The first, size, required that the parcel be large enough to accommodate the variety of uses. Another criterion was topography, which would allow that the site could be physically developed, as well as provide shelter through vegetation and have good aesthetic qualitites. Location and access were the final criteria. A site would need to be located within close proximity to urban tourism services, recreation opportunities and tourism products. A site should be situated to allow for convenient local and regional road access.

EXHIBIT 6-1

TOURISM DEVELOPMENT OPPORTUNITIES

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
INFRASTRUCTURE					
Information	- Relocation of Drumheller tourist information booths (2). Include upgrading and size of structure, combined with highway turn-out/rest area.	- Hwy 9 entry points (2) to City; however, on top of hill, as opposed to existing location at bottom of hill.	- City of Drumheller, Chamber of Commerce, Travel Alberta	1	- Provide better access, visibility, opportunity for visitor orientation.
	- Upgrading tourist information services with additional literature and on-site personnel.	- Tyrrell Museum, Dinosaur Provincial Park (Tyrrell Field Station).	- Alberta Culture/ Travel Alberta	1-2	- Required for increased secondary attractions awareness.
Information	- Coordinated, themed signage for all attractions in study area.	- Local, regional entry point (road/highway) and site-specific locations.	- Travel Alberta, Big Country/ Gateway Tourist Associations	1-2	- Required for increased attractions awareness and easy identification for tourists.
Information	- High-quality brochures for all attractions in study area.		- Private operators, Big Country/Gateway Tourist Associations		
	- Increased availability of attractions brochures.	- Distribution to all retail/service outlets, tourist information locations and other attractions.	- Private.	2	- Promote concept of complimentary, as opposed to competing attractions.

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Information	- Major identity features at entry points to study area - intersections of Highways 2 & 9 and Highway 1 & 873/36 could take the form of a large-scale model dinosaur. Reinforces identity and theme of tourism attraction as well as providing photo opportunity. Also appropriate location for comprehensive information signage with large-scale map and additional detail on individual attractions. Site could also include picnic benches, landscaping, etc.	- Intersections of Highways 2 & 9 and Highway 1 and 873/36.	- Travel Alberta, Big Country/ Gateway Tourist Associations	2	- Required for increased awareness of region and reinforcement of theme.
Highways/Roads	- Corridor road network linkage.	- Drumheller to Dinosaur Provincial Park.	- Joint effort between Alberta Transportation and local municipalities.	1	

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
	- Upgrading of selected roads. Also, an opportunity for enhancement of identified auto tours, through improved thematic signage and additional roadside turn-outs.	- Dinosaur Trail, East Coulee Trail. - Access road network to Dinosaur and Dry Island Buffalo Jump Provincial Parks. - Access road to Wayne.	- Joint effort between Alberta Transportation, local municipalities and the Heritage Society.	1-2	
SERVICES					
Restaurants	- Opportunities for upgrading of existing restaurants, including decor and menu. Expansion of some facilities in major urban centres to allow for tour bus groups.	- Primary opportunities in Brooks and Drumheller. - Some possibilities for upgrading within the rest of the study area.	- Private.	1-2	- Requirement for existing food services to tap expected increased visitation.
	- Opportunities for creation of unique, higher-quality eating experiences, themed restaurants and family/chain-type restaurants.	- Primary opportunities in Brooks and Drumheller. - Secondary opportunities in hamlets close to Drumheller (i.e., Rosedale, East Coulee, Wayne) or close to	- Private	2-3	

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Restaurants (continued)		Brooks (i.e., Patricia), as well as Dinosaur Provincial Park.			
	- Opportunities for seasonal specialty outlets (i.e., ice cream and confections).				- Suitable localities would be in conjunction with certain attractions (i.e., East Coulee School Museum).
Accommodation	- Opportunities for more unique accommodation, catering to increased seasonal traffic - bed and breakfast, and guest ranch-variety accommodation in older homes, farm houses, etc.	- Primary opportunities within Brooks, Drumheller and scenic locations near Red Deer River.	- Private.	1	
	- Opportunities for higher-quality hotels/motels.	- Drumheller, Brooks.	- Private.	1	
	- Opportunities for full recreational amenity/ service hotels/motels that cater more specifically to families.	- Drumheller, Brooks.	- Private.	1	- Either upgrade of existing hotels/motels or new developments.
	- Opportunities for additional hotels/motels.	- Drumheller, Brooks.	- Private.		- Requirement for expected increased visitation.

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Campgrounds	- Opportunity for full services/facilities campground, combined with recreational opportunities (Family Vacation Destination Resort).	- Willow Creek, Drumheller (Newcastle Beach) or Nacmine.	- Private, cooperation with Municipality.	1-2	- Preferred locations are Willow Creek and Drumheller.
	- Opportunity for upgrading of private campgrounds (grounds, facilities, etc.)	- Drumheller	- Private.	1-2	
Specialty Merchandise	- Opportunities for provision of specialty and tourist-oriented merchandise (i.e., gifts and crafts, fine art, specialty clothing items). - Opportunities for specialty outlets (i.e., art gallery, antique store, etc.).	- Drumheller, Brooks.	- Private.	3-4	
ATTRACTIONS					
Coal Mining History Interpretation/ Display	- Atlas Coal Mine: opportunity for full development utilizing innovative interpretive planning and delivery. Potential to	- East Coulee.	- Dinosaur Valley Heritage Society.	1-2	- Tentative plans by the Society to develop underground tours/ interpretation.

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Coal Mining History Interpretation/ Display (continued)	become second major tourism generator in Drumheller area, and to play a significant role in extending the trip time and length of stay of visitors to the valley.				
	- East Coulee School Museum - opportunity for enhancement of displays and interpretation, foot/ cycle linkage to Atlas Coal Mine, Tressel Bridge and Drumheller.	- East Coulee.	- Dinosaur Valley Heritage Society	2-3	- Tentative plans by society to further develop the mining display component.
	- Small communities and old mine sites have potential to upgrade interpretive information and signage, and provide key guide maps identifying locations.	- Wayne (and specifically the Rosedeer Hotel/Last Chance Saloon), Dorothy, etc.	- Dinosaur Valley Heritage Society	3-4	- Could also be combined with a roadside turnout and minimal day use facilities.
Settlement Period Site Interpretation/ Display	- Opportunity exists for the Homestead Museum to upgrade their facility, collection, management and interpretation. Target market segment of the Tyrrell visitorship.	- Drumheller.	- Private.	3	

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Settlement Period Site Interpretation/ Display (continued)	- Enhancement opportunity for Bleriot Ferry; develop passive interpretation, improve amenities and facilities at crossing (such as pull-out, picnic tables).	- North of Drumheller on Dinosaur Trail.	- Alberta Transportation/Parks and Recreation/ Alberta Culture, together with the Dinosaur Valley Heritage Society.		- Addresses concern of peak season crossing line-ups, with no activities to do during wait.
Native Settlement Period Site Interpretation/Display	- Opportunity to enhance three key sites (Crawling Valley, Rumsey Cairn and Suitor Medicine Wheel) through improved interpretive signage. Possible limit to guided tours, due to site concerns.	- Rumsey, Dorothy and Hwy. 36/Red Deer River.	- Private, Heritage Society and Alberta Culture.	3-4	- Concern over site sensitivity, land ownership and access.
Interpretation	- Opportunity for enhanced thematic linkage of tourism resources in the Red Deer River Valley (Red Deer River Heritage Corridor). Linkage must extend to and include all resource categories (palaeontological, native settlement, coal mining/ pioneer settlement). Establishment of interpretive themes,	- Red Deer River Valley (Dry Island Buffalo Jump Provincial Park to Dinosaur Provincial Park).	- Alberta Transportation, Parks and Recreation, Alberta Culture, Travel Alberta, Municipal and Improvement Districts, urban municipalities and local interest groups.	1	- Requirement to coordinate with road network linkage opportunities. - Requirement for a Corridor Master Plan and cooperation of all sectors/agencies involved.

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
	priorities, routes, signage, facilities, promotion, etc.				
Interpretation	- Opportunity for enhancement of existing sites and development of potential Red Deer River Badlands sites. Further scenic and educational tourism experience through additional interpretive and facility development.	- Horseshoe Canyon, Horsethief Canyon, Dinosaur Trail/Orkney Viewpoint, hoodoos and other natural sites and features.	- Alberta Parks and Recreation.	2-3	
Interpretation	- Opportunity for enhancement of Fossil Museum and Prehistoric Park by providing alternative/complimentary interpretation of palaeontological themes not adequately dealt with by the Tyrrell Museum. Also, upgrading of signage and presentation.	- Drumheller.	- Private.	2-3	
Tyrrell Museum	- Opportunity for enhancement of museum, exhibits and programming: - exhibit updating, replacement and rotation.	- Interpretive Gallery.	- Alberta Culture, Parks and Recreation, Travel Alberta, Friends of the Tyrrell Museum.	1	

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Tyrrell Museum (continued)	- development of more active, rather than passive, interpretive experience ("hands on", simulation experiences, special events, roving interpreters). - Upgrading and extension of existing facility (overcome typical black box museum through outside exhibits, fossil/rock garden, etc. - closer integration, and cooperation between Dinosaur Trail, Midland Provincial Park, Red Deer River Heritage Corridor and the Fossil Museum, in interpretive planning and delivery. - Opportunity for enhancement of facility and visitor services:				

EXHIBIT 6-1 (Continued)

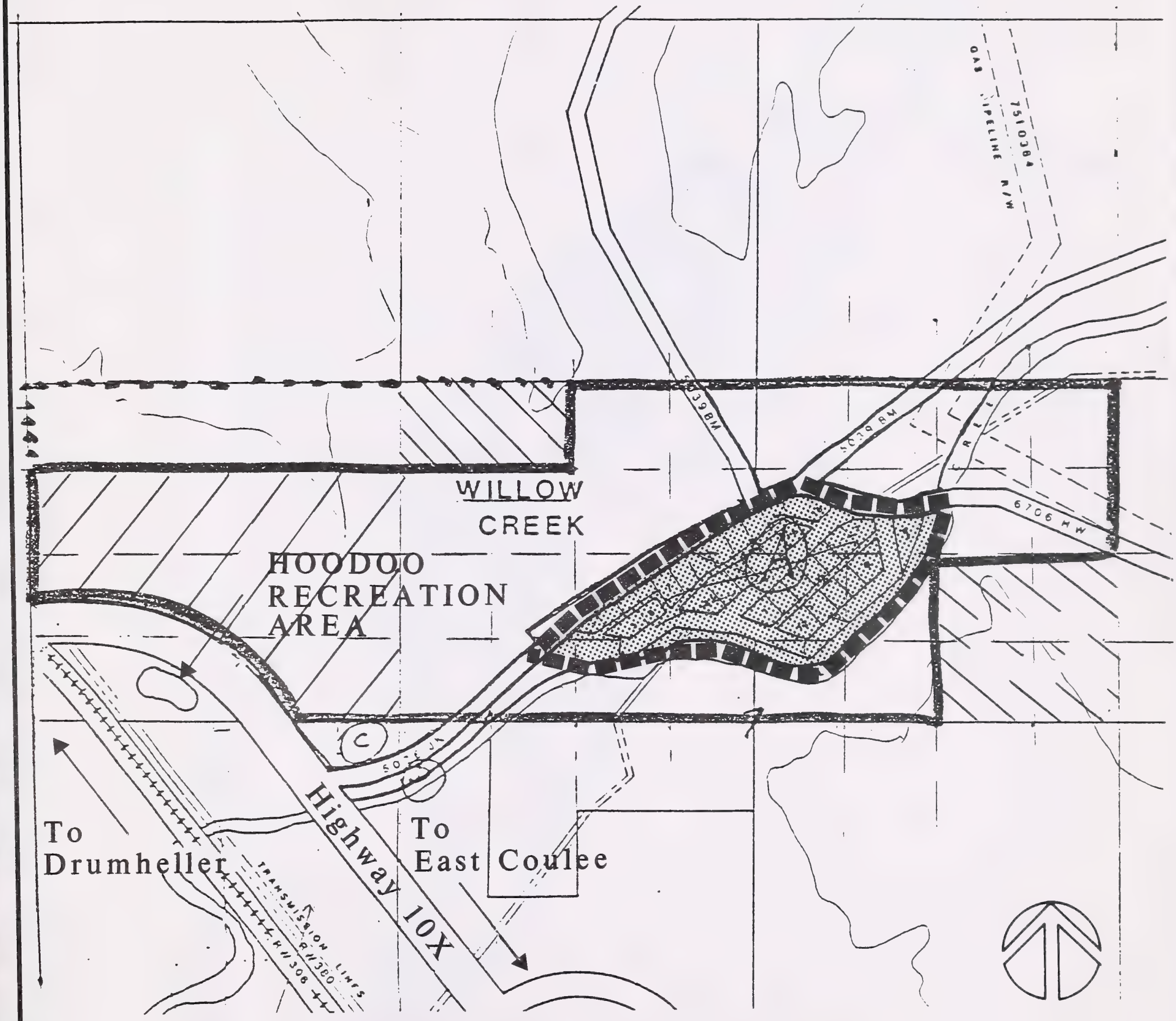
OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Tyrrell Museum (continued)	- Cafeteria upgrading to a "cafe" level service, with interior decorating and higher-quality menu and service.				
	- Upgrading and expansion of gift shop.				- Friends of the Tyrrell assume responsibility of contracting out the gift shop and cafeteria to the private sector.
	- Upgrading and expansion of visitor information services on tourism attractions and facilities elsewhere in the area, through the use of an orientation map and kiosk, attractions display and brochure racks.				
	- Opportunities for enhancement of marketing and promotion:				
	- Marketing plan targeted towards non-resident visitors travelling in the Calgary-Banff region.				

EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Tyrrell Museum (continued)	- Increased range of distribution of print material (Calgary-Banff).				
	- Development of a remote logo highway signage program.				- Heighten interest/ awareness on Hwys 1 and 2.
	- Development of a more proactive marketing program aimed at Alberta, B.C. and Saskatchewan.				
	- More active participation in consortium marketing.				- In conjunction with the Drumheller Valley Tourism Authority, Big Country Tourist Association, etc.
Tyrrell Field Station	- Opportunity for enhancement of directional signage, marketing/ promotion strategy, integration with Tyrrell Museum and Red Deer River Heritage Corridor.	- Dinosaur Provincial Park.	- Alberta Culture, Parks and Recreation, Travel Alberta, Tourism Zones.	1	

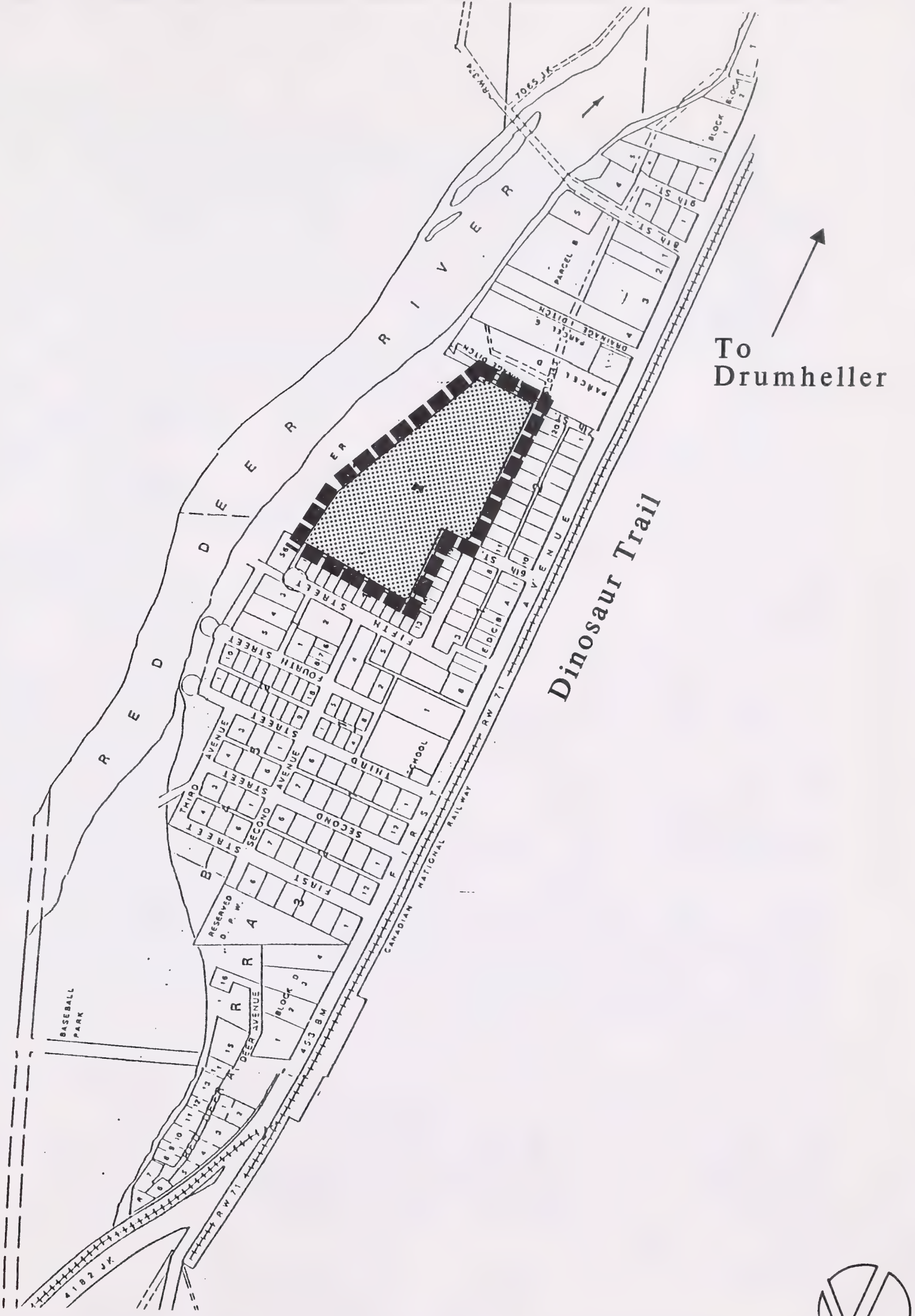
EXHIBIT 6-1 (Continued)

OPPORTUNITY TYPE	DESCRIPTION	LOCATION	SECTOR/ AGENCY	PRIORITY	COMMENTS
Summer Theatre	- Prime opportunity to expand existing summer theatre, as well as provide an additional theatre in East Coulee. Increased duration of existing theatre (i.e., entire summer peak season, matinees for tour bus groups, supplementary night-time activity for tourists).	- Expand Rosebud Dinner Theatre. - East Coulee (use of School Museum).	- Private, Heritage Society.	2	- Tentative plans for expansion of Rosebud operation and facilities. - Tentative plans for theatre facility development at East Coulee School Museum.
	- Opportunity to create travelling theatre group to service campgrounds in the study area on a rotational basis, thereby providing required night time activity.	- Circuit of campgrounds within the study area.	- Private.	3	
Activity Experiences	- Prime opportunity for water-based recreation activities, such as rafting tours and canoe/raft rentals. Will provide greater linkage within Corridor, particularly with Dinosaur Provincial Park.	- Red Deer River (Dry Island Buffalo Jump Provincial Park to Dinosaur Provincial Park).	- Private.	2	- Requirement for additional access locations along the river.



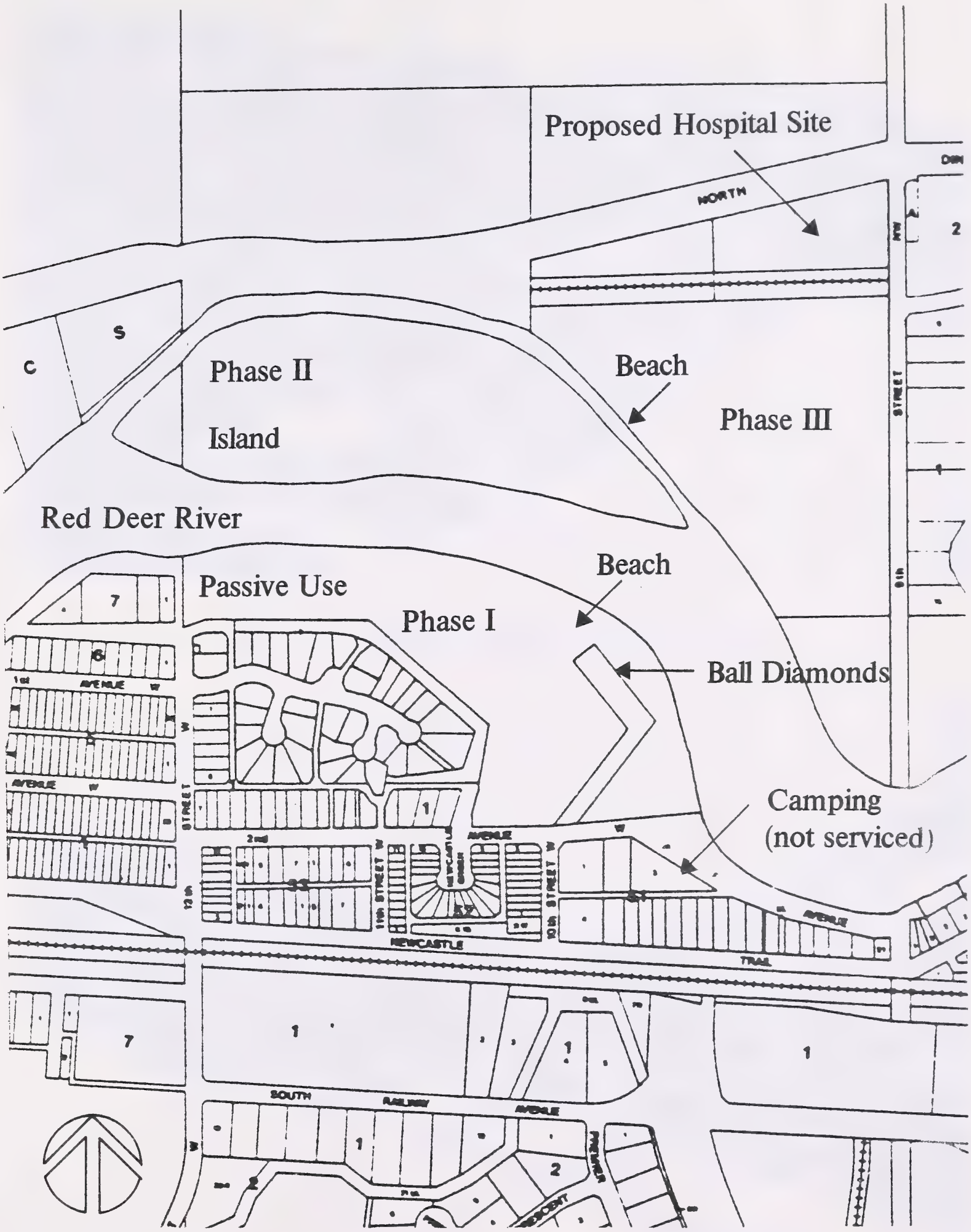
Willow Creek lands for potential Destination Resort Plan Site

IBI GROUP	**DRUMHELLER / DINOSAUR CORRIDOR** Tourism Destination Resort Plan	**EXHIBIT** **6-2**



Nacmine - Potential Destination Resort Plan Site

IBI GROUP	**DRUMHELLER / DINOSAUR CORRIDOR** Tourism Destination Resort Plan	**EXHIBIT** **6-3**



Newcastle Beach lands for potential Destination Resort Plan Site

IBI
GROUP

DRUMHELLER / DINOSAUR CORRIDOR
Tourism Destination Resort Plan

EXHIBIT
6-4

Willow Creek lands for potential Destination Resort Plan Site

Willow Creek - Looking east from highway #10

EXHIBIT
6-5

Nacmine - Potential Destination Resort Plan Site

Newcastle Beach (Drumheller)- Potential Destination Resort Plan Site

IBI
GROUP

DRUMHELLER / DINOSAUR CORRIDOR
Tourism Destination Resort Plan

EXHIBIT
6-6

The first site is privately-owned river valley land in the hamlet of Nacmine. The site is approximately 20 ha in size and is presently undeveloped pasture. The site is close to Drumheller, and its related services and tourism opportunities. Convenient access is provided by the Dinosaur Trail. The site is flat grassland with extensive tree cover, next to the Red Deer River.

The second site is a 12 ha (approximate) parcel adjacent to the Red Deer River. It is partially developed at present as the Newcastle Beach municipal park. Facilities include a shelter, washrooms, concession stand and ball diamonds. Approximately half the site is undeveloped and is tentatively scheduled for 40 to 50 fully serviced campground sites within two to three years. An additional 4 ha island is proposed to be linked to the park. Future facilities on the island would include a foot bridge, concert stage, picnic area, shelter and fishing/paddle boat pond. Adjacent to the park, on the north side of the river is a future 10 ha hospital site. A portion of this parcel will be dedicated for park/recreational development. The City's preferred options would be to either lease the whole site to a private operator or develop the whole site first, then lease the campground to a private operator. Disadvantages associated with this site are the fact that it is relatively small and in close proximity to an existing residential area. The primary advantages are that it is centrally located, in proximity to tourism services and opportunities, possesses an attractive location (river access, vegetation), and has some facility development at present.

The third site analyzed is an old mining townsite located on the low lands of Willow Creek and situated just off Highway 10 between Drumheller and East Coulee. The townsite is approximately 30 ha; however, some 50 to 60 ha could be used in the coulee area. Although it is currently owned by the Crown, the title is in the process of being transferred to Improvement District No. 7. The site is in proximity to tourism services in Drumheller. The I.D. has tentatively identified this as a potential private or public sector campground. The attributes of the site are related to convenient highway access, the aesthetic appeal, its size and the fact that it would help to draw tourists to the existing and proposed attractions in the Rosedale and East Coulee areas.

The fourth site is located along Dinosaur Trail in Midland Provincial Park. It is adjacent to the existing golf course to the north, south and east. As an extensive open area, the parcel for a resort could be as large as 120 hectares. The site is close to Drumheller and its related services, as well as being situated on a designated tourism route. This allows for good access and close proximity to a variety of tourism opportunities, including the Tyrrell Museum. The site is predominantly a flat grassland area, with some variation in topography and vegetation.

Discussions of this concept with the City and I.D. Municipal Administrators indicated that both would be amenable and supportive of this type of proposal. Notwithstanding, due to the proximity of several private campgrounds in the Drumheller area, there is some sensitivity to public sector provision of a fully serviced campground. The most appropriate option, as identified by the City, is to encourage private sector participation in the venture.

6.5 MARKETING PRINCIPLES AND APPROACHES

A stated objective of the Drumheller/Dinosaur Corridor Study was the determination of marketing principles and general marketing approaches that could be used to access the identified tourism markets. These particular aspects have been addressed in considerable detail in three recently completed studies:

- Drumheller Tourist Development Study (March 1988)
- Big Country Zone 3 Tourist Association Marketing Plan (August 1988)
- Gateway Zone 2 Tourist Association Marketing Plan (August 1988)

The latter two documents in particular have set strategic directions for the Zones with respect to marketing approaches and activities and further, describe detailed marketing strategies with specific action plans aimed at select target markets and audiences.

The Drumheller Tourism Development Study has established marketing goals and strategies and an implementation plan aimed at marketing tourism attractions within a more defined region focused along the Drumheller Valley.

"Dinosaurs and More" is the theme that has been adopted by the Big Country Tourism Association and best exemplifies what one might expect to find in the Drumheller Valley Badlands. The Tyrrell Palaeontological Museum is identified as the major tourism lure which sets the corner stone for future tourism marketing within the Big Country Zone.

It should simply be stressed that additional tourism generators proposed for the region strongly associate themselves with the Badlands theme and while stressing product differentiation, tie into the framework and programs as established by the Big Country and Drumheller Valley marketing plans.

7.0 ECONOMIC IMPACT OF GENERATOR DEVELOPMENT

7.1 INTRODUCTION

The capital expenditures that would be required to construct and improve the three provincial parks in the Corridor, the operating expenditures associated with the functioning of the facilities, and the expenditures made by visitors to the provincial parks and to other generators and attractions, would have significant impact on the regional economy and the provincial economy.

The purpose of this section is to attempt to quantify the economic impacts associated with the potential development and operation of the proposed tourism generators. It should be noted that these impacts are considered to be incremental; that is, it is assumed that no capital expenditures would be made, nor additional revenues (over existing levels) from visitors generated, if the proposed facilities were not constructed.

The economic impact of the construction and operation of the tourism generators includes direct expenditures, indirect effects and induced effects. For the purpose of this report, these economic impacts are calculated as additions to gross domestic product, and as equivalent person-years of full-time employment.

7.2 INPUTS

The capital cost estimate for the proposed tourism generators is $1,000,000 for Midland Provincial Park, $11,400,000 for Dinosaur Provincial Park and $2,600,000 for Dry Island Provincial Park, for a total of $15,000,000 in 1988 dollars. The Calgary-Drumheller steam train tour capital costs were estimated at approximately $3,000,000 in 1987 dollars. The family vacation/destination resort capital costs were estimated at $1,500,000. Capital cost estimates for the other potential generators and attractions are not available.

Projected annual incremental operating expenditures are estimated at $55,000 for Midland Provincial Park, $755,000 for Dinosaur Provincial Park and $130,000 for Dry Island Buffalo Jump Provincial Park. Operating costs for the Calgary-Drumheller steam train are estimated at $2,500,000 per annum. Operating costs for the resort are estimated at $100,000 per annum.

As detailed in Exhibit 5-2, the total ultimate projected visitation to the major generators and attractions (including the three Provincial Parks, the steam train tour, the Atlas Coal Mine Interpretive Centre, and the family vacation/destination resort) is 603,800 person visits per annum. However, in order to estimate the economic impact of the development of the generators, the incremental visitation must first be calculated. Incremental visitation is the total projected visitation less current visitation. In addition, the projected incremental increase in visitation at the Atlas Coal Mine Interpretive Centre is removed from the calculations because the Interpretive Centre is considered to be an additional attraction for tourists already in the area; it is not expected to function as a major tourism generator in its own right.

Exhibit 7-1 indicates the total visitor expenditure estimates by tourism generator and classification of visitor. The direct expenditures per capita for Provincial Park visitors are derived from the 1986 economic impact study prepared by the DPA Group for Alberta Recreation and Parks. The per visitor expenditure estimates in that study were inflated to 1989 dollars by the change in the all-items CPI for Calgary. The resulting average per capita direct expenditure estimate for all visitors to the Provincial Parks is $17.50 per day.

The direct expenditures per capita for steam train generated visitors to the region were derived from the Alberta Economic Development Report on the Calgary-Drumheller steam train proposal. The average per capita estimate employed in that study was inflated to the 1989 dollars, and applied to day use visitors. For overnight use visitors, that figure was increased by $12.50, to reflect the increased expenditures associated with accommodations, additional meals, etc. The additional value of $12.50 was derived from the differences in expenditures reported by day use and overnight visitors surveyed at the Tyrrell Museum. The average direct expenditures per capita for all steam train using visitors is therefore estimated at $33.75.

The family destination/vacation resort visitors are assumed to make daily direct expenditures equivalent to those reported by visitors to the Tyrrell Museum. The values employed (inflated to 1989 dollars) are $6.95 per capita for day users, $19.45 for overnight users, and an average of $15.35 for all users.

As indicated in Exhibit 7-1, the total direct expenditures made by visitors to the Provincial Parks are approximately $5.2 million, with $3.9 million

EXHIBIT 7-1

Visitor Expenditure Estimates

GENERATOR		INCREMENTAL PERSON VISITS	DIRECT EXPENDITURE PER CAPITA	TOTAL DIRECT EXPENDITURES
Provincial Parks	Day Use	189,000	$16.25	$3,070,000
	Overnight Use	106,500	19.70	2,100,000
	Total	295,500	17.50	5,170,000
Steam Train	Day Use	73,500	$29.10	$2,140,000
	Overnight Use	43,200	41.60	1,800,000
	Total	116,700	33.75	3,940,000
Family Vacation/ Destination Resort	Day Use	10,000	$ 6.95	$ 70,000
	Overnight	20,000	19.45	390,000
	Total	30,000	15.35	460,000
TOTAL	Day Use	272,500	$19.40	$5,280,000
	Overnight Use	169,700	25.30	4,290,000
	Total	442,200	21.65	9,570,000

accounted for by steam train using visitors, and $0.5 million by family destination/vacation resort visitors. The total direct expenditure estimate is $9.6 million per annum.

The capital cost, operating expenditure and visitor expenditure estimates are summarized by generator in Exhibit 7-2.

7.3 INCOME AND EMPLOYMENT IMPACTS

The construction and operation of the tourism generators and associated visitor expenditures would have a direct impact on the household income and employment of workers in construction, accommodation, food and beverage, and other related industries. The one-time expenditure of approximately $19,500,000 for capital costs, and the recurring annual operating-related expenditures of approximately $3,500,000 would represent a significant incremental flow of income into the regional economy.

Exhibit 7-3 details the potential economic impact of the construction and operation of the various proposed tourism generators. The economic multipliers employed, and the employment levels generated per unit of input are those used in the previously noted economic impact report of Alberta Recreation and Parks. As indicated in the exhibit, the construction of the various tourism generators would provide a one-time economic impact of $31,150,000 to the Provincial economy, and provide 371 person year equivalents of employment. The ongoing operation of the tourism generators, and the resultant expenditures by visitors can be estimated to result in an annual economic impact of $20,910,000, and the provision of 340 person year equivalents of employment.

Although it is difficult to quantify the study area's share of the identified benefits, it is probable that the majority of the benefits - with the exception of the steam train capital and operating cost generated benefits - would be retained within the region. Assuming that 75% of the benefits generated by the construction and operation of the Provincial Parks and family vacation/destination resort would be retained in the region, together with 10% of the capital cost benefits and 25% of the operating and visitor expenditure benefits generated by the steam train, the regional economic impacts could total $19,700,000 for the capital spending, and an ongoing annual benefit of $10,270,000 for the operating-related spending. The employment generated by these benefits totals 240 person year equivalents in the region from the capital spending, and 159 person year equivalents annually from the operation of the tourism generators.

EXHIBIT 7-2

Summary of Inputs in 1989 Dollars

GENERATOR	CAPITAL COSTS	OPERATING EXPENDITURES*	VISITOR EXPENDITURES *
Provincial Parks	$15,330,000	$ 960,000	$5,170,000
Steam Train	3,140,000	2,610,000	3,940,000
Family Vacation/ Destination Resort	1,500,000	100,000	460,000
TOTAL	$19,970,000	$3,670,000	$9,570,000

*Incremental expenditures only.

EXHIBIT 7-3

Economic Impact of Generator Development

GENERATOR	ITEM	INPUTS*	EMPLOY-MENT	MULTIPLIERS	GDP IMPACT*
Provincial Parks	Capital	$15,330	285	1.56	$23,910
	Operating	960	46	2.02	1,940
	Expenditures	5,170	89	1.41	7,290
	Sub Totals	-	420	-	$33,140
Steam Train	Capital	$ 3,140	58	1.56	$ 4,900
	Operating	2,610	124	2.02	5,270
	Expenditures	3,940	68	1.41	5,560
	Sub Totals	-	250	-	$15,730
Family Vacation/ Destination Resort	Capital	$ 1,500	28	1.56	$ 2,340
	Operating	100	5	2.02	200
	Expenditures	460	8	1.41	650
	Sub Totals	-	41	-	$ 3,190
TOTAL	Capital	$19,970	371		$31,150
	Operating	13,240	340		20,910
	Total	-	711	-	$52,060

* In thousands of 1989 dollars.

APPENDIX A:

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APPENDIX A

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APPENDIX B:

List of Personal Contacts

APPENDIX B

LIST OF PERSONAL CONTACTS

1. Ray Romanentz, Administration, City of Drumheller
2. Dave Perraton, Alberta Parks and Recreation
3. Bill Martynes, Drumheller Valley Tourism Authority
4. Doug Milne, Drumheller Regional Business Development Centre
5. Ann Sarsfield, East Coulee School Museum
6. Operator, Carbon Valley Hotel
7. Al Warner, Alberta Transportation
8. Jack Marko, Alberta Transportation
9. Frank Perich, Alberta Transportation
10. Tim Peterson, Town of Trochu
11. Glen Reip, Municipal District of Starland
12. Mr. Davies, Village of Carbon
13. Rob McGinn, East Coulee Motor Inn
14. Barry Boyko, Shady Grove Campground
15. Pat Swain, Dinosaur Trail Campground
16. Fritz DeKeyser, Dinosaur Trailer Park
17. Robert Graham, Alberta Main Street Programme
18. Ted Dykstra, Alberta Environment
19. Operator, Prairie Inn (Morrin)
20. Operator, Big Valley Inn
21. Barry Graham, Dinosaur Valley Heritage Society
22. Laurie Rieffenstein, Drumheller Regional Economic Development Authority
23. Des Broadhurst, Manager, Improvement District No. 7
24. Operator, Heritage Inn (Brooks)
25. Frank Scute, Town of Brooks
26. Les Hurt, Alberta Culture
27. Joe Carbomine, Drumheller Inn
28. Mr. Schinkler, Rosebud Dinner Theatre